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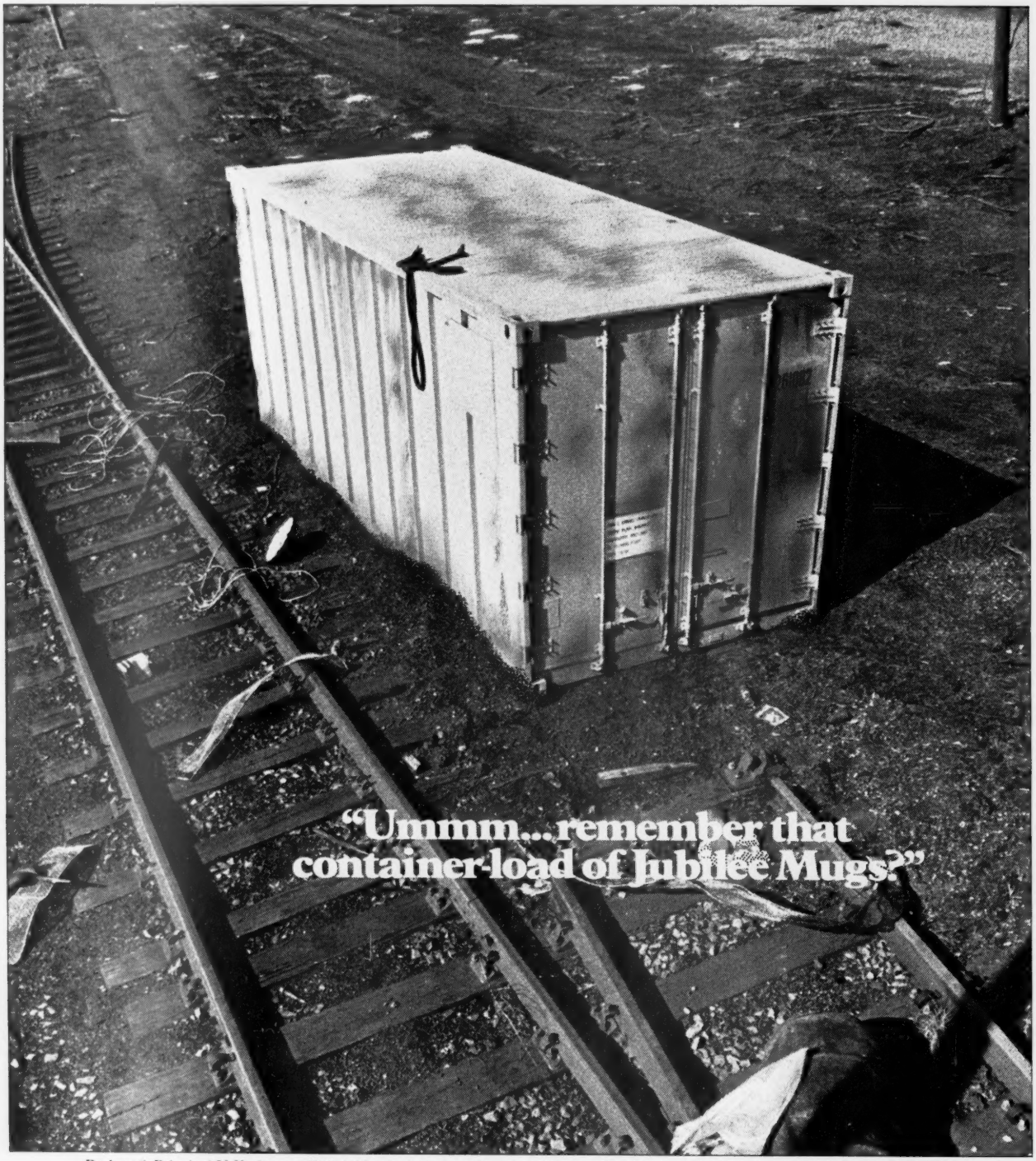

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Trade and Industry

17 August 1979

Weekly news magazine of the Departments of Industry and Trade

Profits of UK industrial and commercial companies have been falling since the early 1960s, but the government has taken measures to help reverse the trend (page 332).

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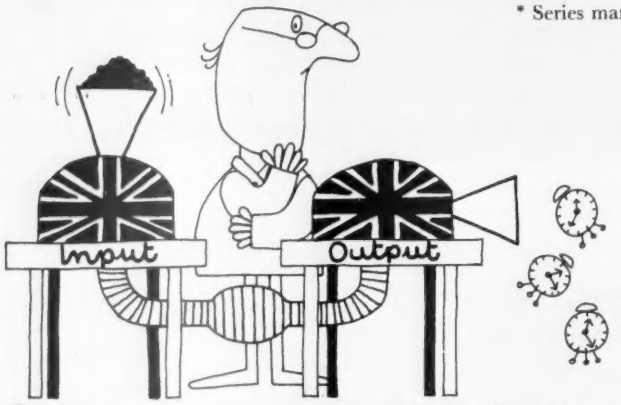
Late deliveries

We apologise to those subscribers who have been experiencing delays in receiving their copies of 'Trade and Industry' in recent weeks. The delays are the result of an industrial dispute at HMSO.

Economic indicators at a glance

* Series marked with an asterisk are not seasonally adjusted.



Output

Gross domestic product. The output measure of gdp fell by 1 per cent between fourth quarter 1978 and first quarter 1979, largely as a result of bad weather and industrial disputes, especially in the road haulage industry. Manufacturing output fell by 1 per cent and the output of the construction industry, particularly dislocated by the severe weather, dropped 10 per cent. These falls were partially offset by a rise in the output of both the gas, electricity and water industries and the mining and quarrying industries, the latter incorporating the steady growth in North Sea oil production. Within the service industries, also affected by the bad weather and industrial disputes, the fall in output of the transport industries was 6 per cent. (Figures due to be published today, 17 August.)

Index of industrial production. Provisional estimates for the first half of 1979 show an increase in industrial output between the first and second quarters, reflecting the recouping of production lost in the early part of the year (owing to industrial disputes and particularly bad weather) and growth in the energy sector, mainly North Sea oil. North Sea oil and gas, was also the main contributor to the 3¼ per cent growth in industrial production over the past 12 months, increasing by 50 per cent, while the output of all other industries rose by 1 per cent. The provisional estimate for all industries in June is 116.0; May's revised figure is 114.3 (1975 = 100).

Consumers' expenditure

Consumers' expenditure on the first preliminary estimate, rose by 3½ per cent in second quarter 1979. There were increases in expenditure in all areas of retail sales and in particular on durable goods. Expenditure on vehicles and alcoholic drink also showed a large increase while that on fuel and light fell sharply. Expenditure in the latest two quarters taken together rose by 3 per cent and was 5½ per cent higher than a year earlier. (Figures due to be published 16 August.)

Retail sales. The provisional index for the volume of retail sales in July shows a 10 per cent fall in sales from the very high June level which was boosted by purchases before the increases in VAT. However, sales in June and July taken together, in both food and non-food shops, were at a similar level to that in April and May. (The provisional index for July is subject to a greater than usual margin of uncertainty.) Trade in the first seven months of 1979 is provisionally estimated to have been 1½ per cent higher than in the second half of 1978.

Prices and costs

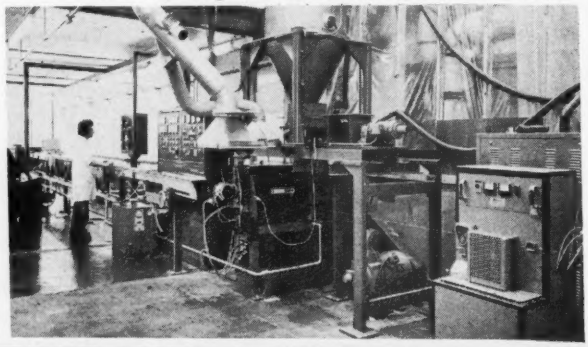
Wholesale price index* (provisional) for materials and fuel purchased by manufacturing industry was virtually unchanged in July. The June index was revised to take account of some of the oil price increases that were backdated to 1 June. In July further higher prices for oil, cushioned to a large extent by the appreciation of sterling, and higher prices for coal were largely offset by the fall in prices for materials other than crude oil. In the latest three months the index increased by 5½ per cent and was 11½ per cent higher than a year earlier. This reflects the faster increase that has occurred in the index over recent months. The provisional wholesale price index for home sales of manufacturing industries rose by 2¼ per cent in July. Higher prices for petroleum products were again a major cause of the increase. The increase in the index over the past year shows signs of accelerating from the turn of the year.

Retail prices index* rose sharply, by 1¾ per cent in June. Over a third of the increase was due to rises in the prices of food, particularly milk and bread. Higher petrol prices and the reduction in tax relief on mortgage interest payments also added to the increase in the index. The year-on-year increase rose again to reach 11.4 per cent in June. The budget changes to indirect taxes are expected to add about 3½ per cent to the RPI by the end of this year. The first stage, about 3 per cent, should be reflected in the index for July (due to be published today, 17 August).

Terms of trade* In the second quarter 1979 export prices rose faster than those of imports and the terms of trade index rose by ½ per cent on the previous quarter and by 3 per cent on a year earlier.

UK competitiveness, measured by normalised unit labour costs, worsened again in 1978 Q4 as sterling continued to rise.

One of the wire extruders installed by Fothergill and Harvey Ltd, Littleborough, Lancashire, at its new £¾ million plant to produce Exar cross-linked polymeric insulated wires and cables. The company is already a major European supplier of fluorocarbon insulated wires and cables primarily designed for aircraft and electronics industries.



Investment

Manufacturing industry's volume of fixed investment (revised figures) fell by less than 1 per cent in the six months ending 31 March but was 4½ per cent higher than a year earlier. However, excluding the iron and steel industry investment increased by 1 per cent in the latest two quarters and was 9½ per cent higher than a year earlier.

Distributive and service industries' volume of fixed investment (excluding shipping) rose by about 2½ per cent in 1979 Q1.

The DoI investment intentions survey carried out in April/May confirms the results of the previous surveys which indicated a further increase in 1979 in the volume of investment by both manufacturing industry and the distributive and service industries (excluding shipping). It also supports the previous expectation that the upward trend in investment will continue in 1980 for the distributive and service industries but probably not for manufacturing. The volume of investment by manufacturing, which rose by 7 per cent in 1977 and 8 per cent in 1978, is expected to increase by 2 to 5 per cent in 1979 (against 4 to 8 per cent expected by the December survey), with possibly a slight fall in 1980. Investment by the distributive and service industries (excluding shipping) is expected to rise in 1979 for the fourth consecutive year. The latest information indicates that the outcome is likely to be in the range 5 to 7 per cent, with a further increase of similar magnitude in 1980.

Incomes

Real personal disposable income (rpdi) was unchanged in first quarter 1979 but was 7½ per cent higher than a year earlier. The savings ratio fell to 15 per cent – about the average for the year ended first quarter 1979.

Average gross earnings* (new series not seasonally adjusted) rose by about 1½ per cent in May although the year-on-year increase fell slightly from 13.5 per cent to 13.2 per cent. By May about half of these workers covered by major agreements had settled and received increases, slightly fewer than a year earlier. Average earnings have increased by 9¾ per cent in the current pay round compared with 10½ per cent at the corresponding time last year, still suggesting that the outcome of the present pay round

will be much the same as last year's.

Labour

Unemployment. Registered unemployment (excluding school leavers) was unchanged in July at 1 278 700 (5.3 per cent of all employees). The level of unemployment is now about 145 000 lower than the peak at the end of 1977. This reflects the steady decline in 1978 and a further fall in second quarter 1979 after the rise in first quarter associated with the severe weather and the transport disputes. The number of school leavers registered as unemployed (not seasonally adjusted) rose in July by 71 756 to 215 526. The level is somewhat lower than a year ago.

Unfilled vacancies (mainly for adults) notified to employment offices fell by 9 400 in July. In general the level has been rising since the trough at the end of 1975. In the latest three months vacancies were 23 per cent higher than a year earlier.

Companies

Gross trading profits of industrial and commercial companies, excluding those engaged in North Sea oil and gas activities and net of stock appreciation, fell by over 20 per cent in first quarter 1979 as a result of the severe weather and industrial disputes. In the latest two quarters combined, profits were 6½ per cent lower than a year earlier.

Liquidity of the (large) industrial and commercial companies replying to the DoI's company liquidity survey fell appreciably in the first quarter 1979, bringing their net current assets and liquidity ratio to the lowest levels since mid-1977. Liquidity has now fallen for three consecutive quarters, after rising strongly from the third quarter 1977 to the second quarter 1978.

Net borrowing requirement of industrial and commercial companies in 1979 first quarter was greater than that for 1978 as a whole, partly reflecting the industrial disputes in the quarter.

Balance of payments

Current account of balance of payments in the first half of 1979 was in deficit by £1,018 million. The latest figures have been distorted by the effects of the road haulage dispute and the irregular flow of information to Customs and Excise. On a 'distortion-free' basis the current account, with an erratically high level of imports, is likely to have been in deficit by around £1.9 billion in the first half 1979. There was a recorded deficit of £1,742 million on visible trade in the first half of 1979 (£290 million a month) compared with a deficit of £406 million (£68 million a month) in the second half of 1978. The projected surplus on invisibles in the first half of 1979 of £724 million contains a lower figure for the second quarter reflecting higher net contributions to the EEC.

UK official reserves* increased by $1,429 million during July inspite of the rise in the effective sterling exchange rate. This substantial increase was after a net repayment of $194 million by the public sector under the exchange cover scheme and a scheduled repayment of $82 million in respect of drawings on the IMF's oil facility. There was a revaluation of $350 million arising from an exchange of gold for European Currency Units (Ecu) with the European Monetary Co-operation Fund.

Volume of trade. In the first half of the year the volume of exports was 2 per cent below the level of the second half of 1978. A lower level of deliveries to Iran and Nigeria contributed to this weak performance but even allowing for this there has been some deterioration in the upward trend in export volume so far this year. The volume of imports has increased sharply in the same period with large increases in imports of chemicals and road vehicles.

DoT's survey of short-term export prospects, based on replies received from 57 large exporting companies, suggests that the total volume of UK visible exports will rise by about 2 per cent in 1979, a slower growth rate than the 3½ per cent in 1978. A rise in volume of 5 to 6 per cent is expected in the second half of 1979, following the fall in volume of 2 to 3 per cent in the first half of 1979. Respondents expected the year-on-year rise in export prices to be 13 per cent in the rest of 1979 compared with 9½ per cent in the first quarter and around 4 per cent in 1978.

Exchange rate

Effective sterling exchange rate* index fell during the week to 71.1 by the close on Thursday 9 August (December 1971 = 100). The index has risen strongly in July, by 5 per cent, and its average for the month of 71.9 was the highest since the beginning of 1976.

Finance

Public sector borrowing requirement (PSBR) fell to £2.6 billion in the fourth quarter of the financial year 1978-79. The PSBR for the full financial year amounted to £9.2 billion.

Exchange rates

The bank note rates of exchange in London on 10 August are given below. Supplied by Thomas Cook Bankers Ltd, the rates are intended as a guide only and are subject to fluctuation. OECD countries are shown in bold.

		You buy at	You sell at
Afghanistan	Afghani	90	110
Andorra	(See France/ Spain)	—	—
Antigua	E. Caribbean dollar	5.50	5.70
Argentina	Peso	2 850	3 550
Australia	**Dollar**	**1.9750**	**2.0350**
Austria	**Schilling**	**29.30**	**31.30**
Bahamas	Dollar	2.24	2.39
Bahrain	Dinar	0.85	0.8850
Barbados	Dollar	4.35	4.68
Belgium	**Franc**	**67.00**	**70.50**
Belize	Dollar	4.50	5.08
Benin	CFA	480	500
Bermuda	Dollar	2.24	2.39
Bolivia	Peso	44.00	54.00
Botswana	Pula	1.97	2.07
Brazil	Cruzeiro	66	80
Brunei	Dollar	4.85	5.05
Cameroon	CFA	480	500
Canada	**Dollar**	**2.5950**	**2.6650**
Chile	Peso	84	98
China	Ranimbi Yuan	Refer	Refer
Colombia	Peso	88	104
Costa Rica	Colon	19.50	21.50
Cyprus	Pound	0.77	0.81
Denmark	**Krone**	**11.60**	**12.10**
Dominica	E. Caribbean dollar	5.50	5.70
Ecuador	Sucre	59	69
Egypt	Pound	1.6900	1.8300
Eire	**Pound**	**1.08**	**1.12**
Fiji	Dollar	1.84	1.92
Finland	**Markka**	**8.45**	**8.80**
France	**Franc**	**9.37**	**9.77**
Germany, FR of	**Deutschmark**	**4.03**	**4.25**
Gibraltar	Pound	1.00	1.05
Greece	**Drachma**	**79**	**83**
Grenada	E. Caribbean dollar	5.50	5.70
Guyana	Dollar	10	Refer
Hong Kong	Dollar	11.30	11.73
Iceland	**Krona**	**890**	**935**
Indonesia	Rupiah	1 300	1 700
Iran	Rial	260	Refer
Iraq	Dinar	0.86	0.93
Israel	Pound	54	62
Italy (20 000 and smaller)	**Lira**	**1 790**	**1 875**
Japan	**Yen**	**485**	**511**
Jordan	Dinar	0.70	0.74
Korea	Won	1 100	1 500
Kuwait	Dinar	0.62	0.65
Lebanon	Livre	7.40	7.90
Liberia (see USA)		—	—
Libya	Dinar	0.93	1.28
Luxembourg (see Belgium)	**Franc**	—	—
Madeira (see Portugal)	Escudo	—	—
Malaysia	Dollar	4.85	5.07
Malta	Pound	0.77	0.80
Mauritius	Rupee	13.00	14.50
Mexico	Peso	47	57
Monaco (see France)	Franc	—	—
Netherlands	**Guilder**	**4.43**	**4.66**
New Zealand	**Dollar**	**2.21**	**2.30**
Nigeria	Naira	2.40	Refer
Norway	**Krone**	**11.06**	**11.51**
Oman	Rial	0.78	0.8250
Pakistan	Rupee	Refer	Refer
Peru	Sol.	490	620
Philippines	Piso	16	19
Portugal	**Escudo**	**105.25**	**110.25**
Qatar	Rial	8.45	8.90
Saudi Arabia	Rial	7.53	7.89
Seychelles	Rupee	12.87	13.35
Sierra Leone	Leone	2.35	2.60
Singapore	Dollar	4.83	5.09
South Africa	Rand	1.97	2.07
Spain	**Peseta**	**145**	**152**
Sweden	**Krona**	**9.30**	**9.70**
Switzerland	**Franc**	**3.64**	**3.84**
Syria	Pound	9.50	10.50
Taiwan	Dollar	85	105
Thailand	Baht	40	46
Trinidad and Tobago	Dollar	5.60	6.70
Turkey	**Lira**	**100**	**106**
Uganda	Shilling	Refer	Refer
United Arab Emirates	Dirham	8.55	9.00
USA	**Dollar**	**2.2275**	**2.2875**
Venezuela	Bolivar	9.25	10.75
Yemen Arab Republic	Rial	11	14
Yugoslavia	Dinar	42	44
Zambia	Kwacha	4.50	Refer

Where more than one rate applies to a currency, the rate given is that for small denomination notes.

Domestic credit expansion was quite large during the banking month to mid-June and in the previous two months. In June the central government borrowing requirement was high but this was more than offset by substantial net purchases of government debt by the UK non-bank private sector: there were high sales of gilts – including instalment proceeds from a previous new issue – and sizeable purchases of Treasury bills. Bank lending in sterling to the private sector, which has more than accounted for the large DCE since the beginning of the year, grew strongly again in June – by £0.9 billion. (Figures to be published 16 August.)

Sterling M3 rose by 1.1 per cent during June. The rise in £M3 of £0.6 billion was less than domestic credit expansion mainly because the banks' non-deposit liabilities rose strongly (ie their liabilities to shareholders). External and foreign currency finance showed little change this month. The increase in the reserves was offset by a further rise in overseas residents' sterling deposits and overseas holding of public sector debt. In the eight months since mid-October 1978 £M3 grew by 13.3 per cent at an annual rate – somewhat above the old guidelines. The new guidelines for the growth of £M3 from mid-June 1979 to mid-April 1980 are 7 to 11 per cent at an annual rate. (Figures due to be published 16 August.)

Bank of England minimum lending rate (MLR) – 14 per cent, effective from 13 June.

More information

For a backrun of figures for some of these indicators see 'The economy: selected indicators', page 352. Inquiries on any of these indicators should be addressed to Economics and Statistics Division 4B, Departments of Industry and Trade, Room 173, 1 Victoria Street, London SW1H 0ET. tel. 01-215 3453.

Home news

Transport may squeeze out other uses of oil

Non-transport uses of oil, including its use for industrial processes, might have to be 'squeezed out by the price mechanism and perhaps by regulatory action' if transport and petrochemicals are to have all the oil they will probably want in the longer-term future.

This is the opinion of the transport working group of the advisory council on energy conservation in the report 'Civil aviation: energy considerations' (HMSO, £2.25) published by the Department of Energy on 7 August.

The non-transport uses of oil which would need the 'squeezing out' process would mainly be electricity generation, domestic heating and heating of offices, shops, schools, hospitals and factories, and industrial processes, the report states.

'This process is already under way and will intensify as oil production levels off. Such a "squeezing out" process, if carried far, would not be painless. It would be helped if sufficient alternative energy supplies – coal and nuclear, wave, wind and solar power – are developed. But if not, the question will arise as to whether transport, including civil aviation, will be able to have all the oil which it would wish to have.'

The report says that if energy policy is expected to require such a shift, it is time to begin to consider how it can take place with the least disruption or, alternatively, to plan for the necessary constraints upon oil consumption by transport.

It calls for an examination of the 'pros and cons' of increased taxes on aircraft fuels and their likely effects as a stimulant to the introduction of more energy efficient aircraft and as a brake on the prospective large growth in air traffics. It is recognised that the UK could not proceed unilaterally as regards international services.

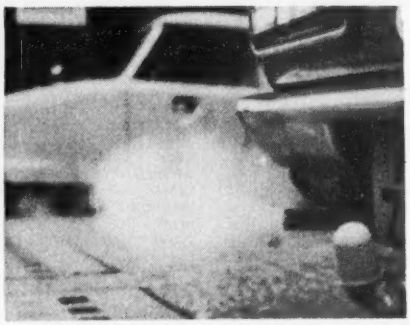
The report suggests that conservation should be explicitly recognised as an integral part of the government's aircraft policy and that the Civil Aviation Authority should be required to have the same regard to energy conservation as it is required to have to environmental considerations.

The report shows that in 1977, UK Civil Aviation transport accounted for about 5 per cent of the UK's inland consumption of oil and oil products (4 million tonnes out of a total consumption for energy use of 80 million tonnes) and for about 14 per cent of the oil consumed by all forms of transport (29 million tonnes).

Of the 4 million tonnes used in 1977, 63 per cent was used on scheduled international services, 32 per cent on non scheduled services and 5 per cent on domestic services.

The average cost of aircraft fuel and oil as a percentage of operating costs rose from 12 per cent in 1972 to 21 per cent in 1977.

Looking to the future, the report notes that



according to Department of Energy forecasts the price in real terms of aircraft fuels could at least double by the end of the century.

It says that UK air traffic may grow to between three and four and a half times its present level, an average growth per annum of about 5 to 7 per cent compound. This large increase in air traffic is expected as a direct result of increased leisure travel which, it is anticipated, will account for around 90 per cent of air traffic by the end of the century.

However, because of improvements in fuel use over the next two decades, fuel consumption is expected to increase at a less than pro rata rate, to about 8 to 12 million tonnes a year.

This improvement in fuel efficiency is expected to derive from the introduction of new aircraft and the retirement of less fuel efficient aircraft now in service. This should result in a reduction by the end of the century of the order of one-third in the fuel consumption required for a given output of seat-km.

Increase in vehicle and aviation fuel deliveries

Oil consumption in Britain during March to May was only 1.1 per cent higher than a year ago. Allowing for this year's colder temperatures, seasonally adjusted figures show that it was 0.3 per cent below last year's level.

Deliveries of all transport fuels, however, were higher. Derv deliveries were up by 7.5 per cent on last year, motor spirit by 3.9 per cent and aviation turbine fuel by 6.4 per cent.

This is shown in the latest issue of *Energy Trends*, the Department of Energy's monthly statistical bulletin.

Total energy used in Britain during March to May was 7.3 per cent higher than a year ago with coal consumption up by 11 per cent and natural gas usage higher by 15.7 per cent. Seasonally adjusted and temperature corrected, the statistics show a much smaller increase of 4.4 per cent in total consumption.

The switch from oil to coal at power stations is reflected in the latest figures. While fuel used for generation increased by 8.3 per cent overall, coal burn rose by 14.8 per cent and oil use fell by 7.8 per cent during March to May. Electricity supplied during the period was 7.3 per cent higher than last year.

Total gas sent out in the first half of the year at 9.9 million therms showed an increase of 11.8 per cent on the first half of last year.

NFC announces energy-saving package

A package of energy-conservation measures aimed at saving over two million gallons of vehicle fuel out of an annual consumption of 45 million gallons was announced on 14 August by the National Freight Corporation.

The conservation programme sets an initial target of a minimum energy saving of 5 per cent across the board, rising to 10 per cent in the medium term.

Call for evidence in lorries and environment inquiry

Sir Arthur Armitage, recently appointed by the Minister of Transport to undertake an independent inquiry on lorries and their impact on the environment, is inviting the submission of evidence.

Announcing the inquiry on 22 May transport minister Norman Fowler said that its terms of reference were 'To consider the causes and consequences of the growth in the movement of freight by road and, in particular, of the impact of the lorry on people and their environment; and to report on how best to ensure that future development serves the public interest'.

He said that government recognised the concern about heavy lorries. But they carried about two-thirds of freight traffic and were of great importance to the economy. 'We need to see how the public interest is best served, taking account of economic benefits, the efficiency of road freight transport, and the damage and disruption which lorries can cause. In particular, the inquiry must face squarely the issue of whether there should be any change in the present limits on miximum weight.'

Evidence should be submitted by 9 November 1979. The inquiry would like to have as soon as possible any evidence, or part of any evidence, which is ready before 9 November. Evidence should be sent to the secretary to the inquiry, Mr. P. Wood, Room 1/3, Old Admiralty Building, Whitehall, London SWTA 2AZ, tel. 01-212 3933 or (after 31 August, 01-273 3045.)

Transport bill to feature new bus licensing system to 'encourage competition'

Relaxation of bus licensing, selling shares in the National Freight Corporation and restructuring vehicle excise duty on heavy goods vehicles will be among legislation proposed in the government's transport bill to be introduced this autumn.

Changes in the bus licensing system to 'benefit the passenger' and 'encourage competition' are to be included in the transport bill. Proposals to relax the licensing system have been circulated by Norman Fowler, Minister of Transport. They represent the first serious attempt in 50 years, to reshape the system in ways which are specifically designed to benefit the bus passenger, Mr Fowler said. 'The proposals encourage competition. They do not in any way weaken controls over safety. Those who cannot meet the safety standards cannot operate.'

Mr Fowler said he aimed to make it easier for new services to develop. The last government had begun the process of encouraging new initiatives where conventional services were no longer the answer. His proposals carried this process a step further, while protecting existing local bus services where this was in the public interest.

On car sharing, the minister said that for many journeys the car was the most flexible and cheap form of transport. 'I aim to make it easier for people who must use their car to share it with others without fear of breaking the law. This will not only save fuel, it will also reduce congestion', he said.

The policy document says that the system of bus licensing in operation in Great Britain today was set up in the very different circumstances of half a century ago. A problem then was increasing numbers of bus and coach operators competing for passengers and a key objective was to restrain this competition and the price cutting it engendered. Over the years, additions and amendments have been made to the system and new laws and regulations have been passed. All this together with the recent development of public financial support and the differently based requirements of the EEC has combined to make bus licensing highly complex. It is difficult to understand and daunting to new entrants. It hampers initiative and restricts competition.

The document points out that from 1 January 1983 buses and coaches will be subject to a stringent new annual test under EEC rules: this calls into question the need for each vehicle to have a PSV licence as well.

Competence, fitness and financial standing of the operator is already covered by an EEC directive and also implemented, not very appropriately, through the vehicle licensing system.

It is proposed to end 'the present cumbersome system' for licensing each vehicle and to replace it with a simpler operator licensing requirement, reducing bureaucracy and paperwork.

The opportunity will be taken to remove the unnecessary restrictions on the use of articulated buses on farepaying services. Some operators see advantages in using this type of bus which has two compartments, joined by an articulated section, bo[illegible]rrying passengers who can move freely between the compartments. The removal of the present restrictions, subject to appropriate construction standards, would have no adverse effects on safety.

The current requirement for a road service licence effectively restricts the number of services which can be provided and protects existing operators from competition. Road service licence requirements will continue for the time being for the stage carriage network. These are the typical local bus services which account for over 90 per cent of all licensed routes. The provision of local bus services involves a complex mix of factors. In recent years considerable financial support has come from public funds and county councils now have new responsibilities for public transport planning. There could be a risk of loss of services if licensing were immediately removed. More needs to be known first of the effects of increased competition on networks.

Local bus services will therefore still require road service licences. But in order to ensure that licensing protection is given only where necessary and does not discourage innovation and enterprise, the statutory criteria on which Traffic Commissioners decide whether to grant a road service licence will be redefined. The balance of presumption will be shifted in favour of a licence being granted save where the commissioners are satisfied that to do so would be contrary to the interests of the public.

Scheduled express services are at present defined as those where the minimum fare is 21p or more. There is no reason why there should not be competition between operators running inter-city bus and coach services, the document states. It is therefore proposed to remove road service licensing, including fares control, for these services but legislation will be drawn up which distinguishes between stage and express carriage by reference to a new minimum fare and distance.

Excursions and tours are unscheduled express services at return fares where all the passengers travel together for the whole trip, eg a day excursion or a tour of several days. Road service licensing and fares control will be removed from these services also.

The previous administration introduced in the Passenger Vehicles (Experimental Areas) Act 1977 powers to relax controls on a trial basis in certain areas. That was an interesting and valuable approach and it is proposed to build on it. Discussions will take place with local authorities about a new power to designate by order a limited number of 'trial areas' with the agreement of the county council (or regional council in Scotland) in which the requirement for a road service licence would be removed for all types of service. Such trials would demonstrate whether the interests of the public would be best served by a complete abolition of road service licensing.

At present private cars come within the scope of the bus licensing law if passengers make a contribution towards the cost of the journey but under a complex set of rules are then exempted provided there is no public advertisement. In future, private cars and small minibuses (with up to eight passenger seats) will be completely outside the licensing system, where they are not used commercially. This exemption limit will be in line with EEC thresholds. Individuals will be free to advertise that they will take passengers in those vehicles on a cost-sharing basis.

The exemption threshold from PSV licensing for vehicles hired as a whole will be raised from seven to eight passenger seats.

The proposals seek to strike a balance between the desirability of encouraging new initiative and enterprise and the need to keep controls both to maintain safety standards and to give some protection for local services where this is in the public interest, the document states. The results from the experimental areas will enable a better assessment to be made of how far that continued protection for local services is justified. The other relaxations proposed will enable new services, for example inter-city coach services, to develop to provide a better service to the public.

. . . provision for private investment in NFC

The transport bill will also contain provisions enabling the government to sell shares in the National Freight Corporation to the public in order to achieve substantial private investment in it. The legislation will seek powers to enable the minister to create a company to inherit the assets and liabilities of the corporation. Shares will be sold to both the public and to employees. Mr Fowler said: 'The intention is to retain the National Freight Corporation in its present form. It is not our intention to sell off just parts of it'.

. . . and restructuring of HGV excise duty

The transport bill will also include proposals for restructuring vehicle excise duty on heavy goods vehicles. A consultative document has been issued setting out proposals foreshadowed in the chancellor's budget speech.

The changes will make it possible for the tax burden of the different classes of goods vehicle to be related more closely to the road costs they impose and thereby ensure a fairer basis of taxation.

The proposals apply to a quarter-of-a-million vehicles over 12 tonnes gross weight. In future, these vehicles will be taxed according to their gross weight and number of axles, instead of the present unladen weight basis. The change will provide operators with an incentive to acquire less damaging vehicles and thus promote economic usage of the roads.

The change-over will not start before 1981. The proposals will apply irrespective of the outcome of the government's wider review of vehicle excise duty announced by the transport minister on 25 May.

Health and Safety Executive Publications

The 1974 Health and Safety at Work Act gave the Health and Safety Commission responsibility for keeping some 25 million people informed of guidelines and regulations for their health and safety in places of work. The Commission has undertaken progressively to revise, standardise and extend the existing regulations and recommended practices. HSC/HSE publications reflect the major programme of research, inspection and consultation which is in hand.

Priced publications are obtainable only from HMSO or through booksellers. Some general leaflets, advice and information are available free of charge from HSE Area Officers or by post from HSE General Enquiry Point, Baynards House, 1 Chepstow Place, London W2 4TF (Tel. 01-229 3456 ext. 734).

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HSC2 to HSC7 inclusive are being discontinued. The texts are being issued in supplements to the June, August, October and December Health and Safety Commission Newsletter. The Newsletter, published bi-monthly, is obtainable on subscription (£1 per annum, or less pro rata depending on quantity). Subscription forms from HSE General Enquiry Point (see above).

* HSC 8 Safety Committees guidance to employers whose employees are not members of recognised independent trade unions
HSC 9 Time off for the training of safety representatives (Code of Practice)

*** Agricultural Safety leaflets**

AS1 A short guide to the 1974 Act
AS2 Tractors safety cabs
AS3 Bulls
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AS7 Guns
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AS16 Brakes for tractor-trailer safety
AS18 Storage of pesticides on farms
AS21 First aid in agriculture

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MS(B)3 Anthrax
MS(B)4 Effects on the skin of pitch and tar
MS(B)5 Skin cancer caused by oil
MS(B)6 Occupational industrial dermatitis
MS(B)7 Poisoning by pesticides

Guidance Notes

Guidance Notes (price 30p each) are too numerous to list here but are published under five headings: Medical; Environmental Hygiene; Chemical Safety; Plant and Machinery; General.

Enquiries to HMSO

* *Free of charge*

Go ahead given for Shell and Esso's Fife petrochemical complex

Outline planning permission for proposals by Shell and Esso for a petrochemical complex has been granted by Scottish secretary George Younger. It gives the companies permission to build a natural gas liquids separation plant and an ethane cracker at Moss Morran, near Cowdenbeath in Fife together with an associated marine terminal and storage facilities at Braefoot Bay, between Aberdour and Dalgety Bay, also in Fife.

He has also granted outline permission for the use of the remaining 175 hectares of the Moss Morran site for industrial development, on the understanding that this would consist of compatible down-stream petrochemical development and related industry only.

The permissions granted by the secretary of state following his call-in of the three planning applications are subject to a large number of conditions designed to ensure public safety and minimise the effects of the developments on the environment.

The applications were made by Shell and Esso in the early part of 1977 and, because of their importance, were called in by the Secretary of State for Scotland. A public inquiry took place in June and July 1977 and the report of it was submitted to the secretary of state in November 1977. Having considered the report the then secretary of state announced in March 1978 on a provisional basis the decision that he was minded to issue, namely that he considered that it would be appropriate for him to accept the reporter's recommendation that planning permission should be granted. However, before reaching a final decision the then secretary of state said that he would want to consider any representations on the issue of the possible risk of hazard from radio transmissions – a matter which had not been discussed at the public inquiry. Representations were received and in the light of them the Health and Safety Executive (HSE) prepared a report on the question of radio transmissions in July 1978 and submitted it to the secretary of state. This was circulated to those interested and in the light of the further representations received HSE carried out tests and submitted a further report to the secretary of state in March 1979.

After fully considering the public inquiry report, all the material and the representations received the secretary of state confirmed the provisional decision announced by the previous secretary of state and has attached to it conditions on the same lines.

The safety conditions have, however, been strengthened by requiring the developers to carry out a full independent hazard and operability audit to the satisfaction of the secretary of state before the plant is commissioned.

The plant cannot be operated until any requirements of the secretary of state in the light of this audit have been complied with. The HSE will be involved throughout the planning and commissioning of the plant and have the power to issue an improvement or prohibition notice if a contravention of the relevant safety provisions is observed or anticipated. The secretary of state considers that with such a strong and continuing statutory safeguard in existence together with the requirement for a full hazard audit to his satisfaction there should be no question of an unacceptable risk emerging as a result of the development.

Another condition deals with the issue of radio transmissions which was the subject of detailed investigations by HSE. Under this condition operation of the Moss Morran and Braefoot Bay facilities cannot start until such time as any measures considered necessary by the secretary of state have been taken to deal with any hazard effects of radio transmissions on the facilities. The condition requires comprehensive tests to determine electromagnetic field strengths and levels of power induced in site structures to be conducted on the proposed plant during its construction to the satisfaction of the secretary of state and the installation of safeguards and monitoring devices wherever this is thought to be necessary.

Guidance for Oxford firms

A one-day clinic for small businesses is to be held in Oxford on 30 August.

Organised by the Small Firms Information Centre, Luton, the clinic will be held at the Jobcentre, 28–31 St Ebbes Street, Oxford from 09.00 to 17.00 hrs. Anyone interested in the service should ring Oxford 723241 or call at the office. The small firms counselling service will be among matters dealt with.

Gatwick prepares for stretched jumbo

Work has started at Gatwick airport on a £3 million contract to construct 70 000 m^2 of new aircraft stands and taxiways to handle Boeing's stretched 747 jumbo jet. The aircraft is due to enter service in the 1980s, carrying 600 passengers at a time, over 20 per cent more than the largest current civil aircraft. A circular satellite at Gatwick will provide facilities for eight wide-body aircraft including two stretched-747s.

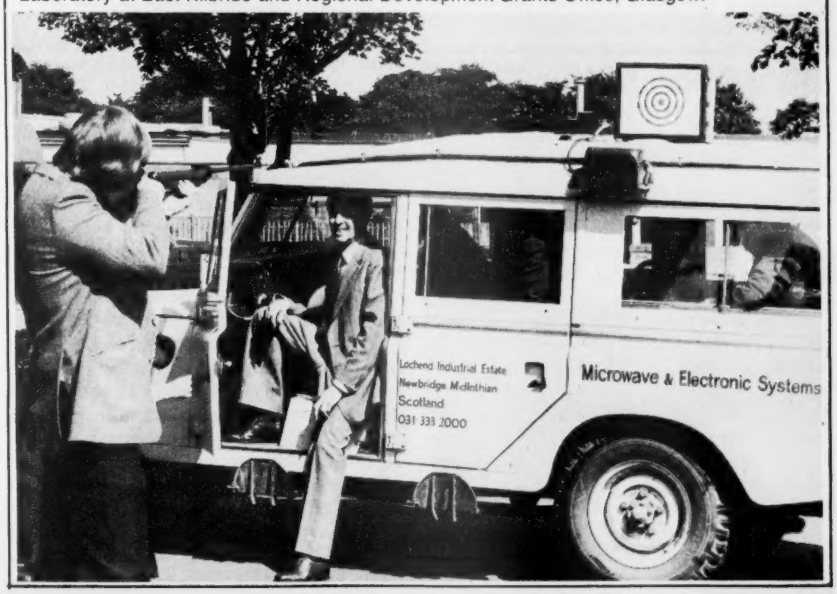
UAE coastguards trained

Five coastguard officers from the United Arab Emirates have completed an intensive course at the Coastguard training school, Brixham. At a recent presentation ceremony, certificates of competency in all aspects of marine search and rescue were presented to these officers by the Chief Coastguard, Lt Cdr Tim Featherstone-Dilke.

In the course of their instruction during the 10 months at the school the officers visited many maritime rescue organisations including the Royal Navy, Royal National Lifeboat Institution, GPO Coast Radio Stations, Trinity House, Lloyds and search and rescue units of the RAF and USAF.

Sir Keith visits Scottish high-technology firms

It looks like a nasty moment for industry secretary Sir Keith Joseph (seated) when he visited Racal-Mesl at Midlothian, near Edinburgh, last week. But he was merely receiving a demonstration of Claribel, the hostile fire locator, which is produced at the factory. The equipment, used to locate a sniper, is arousing interest in the middle eastern and American markets. Sir Keith, on a two-day visit to Scotland, examined the scope for development of enterprise particularly in highptechnology companies. He visited the Department of Industry's National Engineering Laboratory at East Kilbride and Regional Development Grants Office, Glasgow.



Government aid for mineral exploration

Almost £1 million (£993,230) of assistance was approved by the Department of Industry for mineral exploration projects in Great Britain during the year to 31 March 1979, according to the seventh annual report of the Mineral Exploration and Investment Grants Act 1972, published by the Department of Industry on 8 August. This brings total assistance since the act came into force to £2.6 million.

During the year 15 companies – 12 British and three overseas companies registered in Britain – applied for £1.7 million worth of aid for 24 exploration projects, or further stages of existing projects. Seventeen were for non-ferrous exploration, three for fluorspar, two for barium minerals, and two for potash.

Since 1972, 48 companies involved in mineral exploration in 174 projects have applied for assistance totalling £4 million. Seventy-six of these projects were in Scotland; the rest were in Wales, south-west England, north England and Pennines, and west Midlands.

In addition to assistance already awarded by the department, applications for a further £1.4 million involving 13 projects are under consideration. Work on 111 projects has been finalised.

The act enables the government to give financial assistance towards exploration for mineral deposits in Great Britain and on the UK continental shelf. Companies may apply for up to 35 per cent of the costs of searching for ores of non-ferrous metals, fluorspar, barium minerals, and potash. This covers exploration and evaluation of a project up to the point where a decision can be taken on the commercial viability of an orebody.

'Mineral Exploration and Investment Grants Act 1972, seventh annual report' is available from HMSO, price 40p. Details of the scope and conditions of the scheme are set out in a booklet 'Financial assistance for mineral exploration in Great Britain: a guide for industry' obtainable from the Department of Industry, PTM 2B Ashdown House, 123 Victoria Street, London SW1E 6RB, tel. 01-212 6879.

Disbandment of economic planning councils

Michael Heseltine, Secretary of State for the Environment, has announced that economic planning councils will cease to exist on 1 September.

This follows an earlier announcement, made in the House of Commons on 24 July, in which it was said that following a review of the eight economic planning councils, Mr Heseltine had decided to disband them during the summer recess. The decision was made in the context of the wider review of public bodies to which ministers appoint members.

The regional planning boards, made up of officials, will continue in being under the chairmanship of the DoE regional directors.

These boards have a close working relationship with local authorities, and will continue to maintain this and any other appropriate advisory contacts in the regions by less formal means than in the past.

Industrial development certificates discontinued

The scheme, announced last November, enabling local authorities to receive industrial development certificates (IDCs) for advance factories up to a total of 60 000 sq ft for each district council or London borough area was discontinued on 7 August.

The exemption limit for IDCs was raised to 50 000 sq ft on the same day, enabling local authorities and private developers to build to this limit without an IDC. Where a need exists they will now be able to provide advance factories for rent by small firms.

The scheme had therefore become unnecessary. Applications for IDCs under the scheme which have already been received will be approved.

The scheme was announced on 14 November 1978. It was intended to assist local authorities in the intermediate areas or non-assisted areas, where the IDC control applied, to build advance factories for small firms to rent.

Industrial development certificates issued under the scheme contained conditions under which the advance factories could be occupied only by companies from the county concerned (or the Greater London Council area) or by new firms, and no one company could occupy more than the then exemption limit of 12 500 sq ft in the south east and 15 000 sq ft elsewhere.

The increase in the exemption limit was one of the changes in regional policy announced by the Secretary of State for Industry on 17 July (See *Trade and Industry*, 20 July, page 101).

Dan-Air licensed to fly Gatwick to Aberdeen

The Civil Aviation Authority has granted an application from Dan-Air for an air transport licence to operate between London (Gatwick) and Aberdeen in place of British Airways, which will continue to serve Aberdeen from Heathrow.

The authority believes that the development of Gatwick as an airport and the satisfaction of public needs are most likely to be served if Dan-Air can develop the Aberdeen service from Gatwick, while British Airways perfects its Heathrow to Aberdeen service, with the possibility of a shuttle service in 1983 or 1984.

British Airways' current Gatwick to Aberdeen service is unprofitable, unlike its Heathrow to Aberdeen service. The authority believes that the latter could be made even more profitable if BA were relieved from serving Gatwick.

The evidence is that Dan-Air, which proposes to offer greater frequency and a lower normal fare than British Airways, could expect to serve Aberdeen profitably from Gatwick within a reasonable development period.

'Cat' supports wildlife

This wooden build-it-yourself catamaran that can be assembled in two weeks, makes an important contribution to the protection of wildlife. For every Pandamaran purchased a royalty is paid to the World Wildlife Fund to support its conservation work. In trials Christian Brann's Pandamaran reached 15 knots. The twin hull catamaran design means it will not heel and roll even in a stiff breeze. Ideal for an adult and a youngster to sail together, the 13 ft craft is fast, yet safe and reliable.

Occupational deafness benefits scheme extended

More workers in noisy jobs will be able to claim industrial injury disablement benefit for occupational deafness under regulations which come into operation on 3 September.

Regulations made by Lynda Chalker, Parliamentary Under-Secretary of State for Social Security, on 3 August extend benefit to more workers affected by occupational deafness. These include:

- ☐ Workers who use pneumatic percussive tools on metal or for drilling rock or coal, and to those who supervise or assist in such work: until now only the tool users in certain restricted occupations have been covered
- ☐ Workers in textile weaving sheds or on texturing machines
- ☐ Workers on metal nail cutting and cleaning machines
- ☐ Workers who operate plasma guns for spraying metal coatings.

The regulations also ease the definition of occupational deafness. This means people whose claims failed under the old definition will be able to claim again. The scale of assessment of disablement used by doctors in deciding the degree of disability is also being amended to reflect more accurately the nature of occupational deafness and 100 per cent disablement benefit will now be paid for a hearing loss of over 105 dB instead of 90 dB as at present. However, provision is made to ensure that no existing beneficiary will become worse

off as a result of the new regulations.

At present the scheme, introduced in 1975, covers workers in a number of the most noisy occupations who have worked in one or more of the prescribed occupations for at least 20 years and, if they have left the occupation, have made a claim within 12 months of leaving.

Extension of the scheme was recommended in a report by the Industrial Injuries Advisory Council published in July 1978. The government is implementing in full the recommendations of the council. The council has been asked to keep the occupational deafness scheme under continuous review.

Environment secretary sells Drake and Scull shares . . .

Environment secretary Michael Heseltine has decided to dispose of his department's shareholding in the mechanical and electrical engineering company Drake and Scull Holdings Ltd.

The government stepped in to help the company in August 1976 at a time when financial difficulties placed in jeopardy major public sector and overseas contracts. The secretary of state considers that the objectives of the rescue operation have now been achieved. The company is now trading profitably and resumed paying ordinary dividends to its shareholders last year.

An agreement has been signed terminating the one made between the secretary of state, the company and its bankers in August 1976 under which the government gave financial assistance amounting to some £600,000 to the company by subscription for E preference shares. Arrangements have been made to convert these shares into 2 392 664 ordinary shares which have been placed with institutional investors to realise £765,652.

It was decided, in full agreement with the company and in line with government policy on the disposal of state interests in private undertakings, that continuing government involvement was neither necessary nor desirable.

and cuts housing allocations by £50m

Mr Heseltine has made a £50 million cut in the housing capital allocations for 1979-80. The allocations will amount to £2,544 million instead of £2,594 million. The saving is part of the adjustment to public expenditure being made following the budget announcement of 12 June.

The revised provision will enable the present level of local authority new housebuilding to be maintained, the Department of the Environment states. The effect of the adjustment is to eliminate the previous financial overprovision.

Provision has been made for a net increase in the allocation for improvement of local authority dwellings. This reflects the present trend in local authorities' policies and activities.

There will be no cuts in allocations for private sector improvement grants, mortgage lending for house purchase, or housing association activity financed by local authorities.

A contingency sum of £50 million has been retained to ensure that expenditure remains within the cash limit of £2,594 million, given that local authorities can use tolerance. This sum may be distributed later in the year, but only if the developing pattern of local authorities' expenditure suggests that this can be done without breaking the cash limit.

Attachment of seamens' earnings

It is now possible for deductions to be made by an employer from the wages of a merchant seaman who has defaulted on payments under a maintenance order. In addition, in Scotland the wages of a seaman of a fishing vessel will no longer be exempt from arrestment for any kind of debt.

These changes result from the bringing into effect on 1 August of section 39 of the Merchant Shipping Act 1979.

The law has been changed to prevent a merchant seaman from evading legal liability to support a separated or divorced wife and family who are now on the same footing as dependents of men employed ashore. In England and Wales the recovery of debt can be made under an attachment of earnings and in Scotland by arrestment of wages.

Government committed to reducing monetary growth – Chancellor

The government is committed to a progressive reduction of monetary growth targets, Chancellor of the Exchequer Sir Geoffrey Howe told bankers on 8 August. He was speaking at a luncheon given at the Guildhall by the Institute of Bankers for participants in the thirty-second international banking school.

'I cannot emphasise too strongly this government's commitment to controlling monetary growth in order to bring down inflation,' he said, 'We have set a target for monetary growth slightly lower than that of the previous administration. We are, moreover, committed to a progressive reduction in such targets over time. As we bring public expenditure more into line with our monetary objectives, I am confident that we shall be able to control the money supply without placing so much of the burden on the private sector, whether through taxes or interest rates.'

There was a clear and inescapable relationship between money supply and pay, and between both of these and other elements of economic success – production, profits, productivity and employment, he said. It was the duty of any responsible chancellor to maintain strict control of the amount of money that was available in the economy. He must also control the amount of money available for the payment of those who worked in the public sector. Any attempt to overthrow that monetary discipline must result in higher prices, more bankruptcies and rising unemployment.

While a substantial rise in unemployment over the next year or two was possible, it was not inevitable from the start, the chancellor said. The level of unemployment was not simply determined by government. Management and unions had a choice and a major responsibility too. Every unreasonable pay demand increased the risk of high unemployment. Every unnecessary strike delayed the hope of economic recovery.

'Although Britain's economic situation is serious, it is certainly not beyond remedy,' said Sir Geoffrey. 'There are whole areas of our economy which are competitive and highly efficient. British agriculture, for example, is among the most efficient in western Europe. Our distributive services operate extremely well. And all those activities which sustain Britain's invisible earnings make a vital contribution to our economic success. Tourism, shipping, civil aviation and a host of other services such as engineering, advertising and entertainment all play an important part. Last year, invisible credits amounted to over one-third of our total current account earnings, and the private sector surplus on invisibles, Sir Geoffrey said, totalled over £5 billion. Our banking and financial services have made this city of London the world's leading financial centre; these services contributed net earnings of over £2 billion last year.'

Contract for navigation aid tester

A £1 million contract from the Ministry of Defence has been awarded to G. and E. Bradley Ltd, a subsidiary of Lucas Industries, for supplying test sets for the airborne Tacan and DME navigation systems. The portable Bradley test set, battery or line operated, enables the performance of the complete airborne installed to be evaluated quickly and accurately prior to take off. It is also used in the workshop for servicing and bench testing the Tacan or DME equipment. Pictured is the Tacan test set operating in radiating mode against a background of the Panavia Tornado.

British Rail £10m loss in first six months

A deficit of nearly £10 million after interest and other charges, compared with a £7 million surplus for the same period last year, was recorded by British Railways Board for the first six months of 1979.

Three factors were responsible for the loss, explained chairman Sir Peter Parker – the bitter winter, the national disruption of industrial disputes, and the escalating cost of fuel. Fuel costs were running at the rate of £85 million a year at the beginning of 1979, and the latest estimate is £132.5 million.

'We are still determined to try to absorb these extra costs without passing them on in rail fares this year, but it will be very tight,' Sir Peter said. 'It is a real achievement for BR that the cost to the nation of its railway service was actually cut by 25 per cent in the last three years, and fares have not added to the inflationary strains this year.' He added that the continued growth of rail passenger business was helping to justify the fares freeze, but fuel costs and the kick-up of inflation, bringing high material costs, meant that a substantial increase in fares was now certain for next January. He said that freight carryings were suffering badly from the continued slow down in industrial activity in the country.

Security and safety at Windscale to be reviewed

An independent review of security arrangement at British Nuclear Fuels' Windscale plant, in Cumbria, is to be undertaken by Sir John Nightingale, retired Chief Constable of Essex.

Announcing the appointment, energy secretary David Howell said that Sir John's terms of reference were 'to review the precautions for protecting the security of material, both at Windscale and in transit from Windscale, and to make recommendations in the light of the current assessment of the threat.'

For security reasons his report would not be published.

Mr Howell added that he understood that the Health and Safety Executive was already making arrangements for a comprehensive evaluation of the safety arrangements at Windscale. It would be conducted by a review team which would include senior representatives of the Nuclear Installations Inspectorate and the Department of the Environment. Their report would be published.

Tax deposit certificate rates increased

Rate of interest on certificates of tax deposits accepted under the prospectus dated 14 May 1979 and applied in payment of tax was increased on 6 August to 14 per cent. The bonus on deposits applied in payment of tax and held for more than six months is now nil. The rate of interest on deposits withdrawn for cash is 11 per cent.

These rates also apply on and after 6 August to deposits made under the earlier prospectuses (series 1, 2 and 3) which reach the second or fourth anniversary of the deposit, as applicable, in accordance with the terms and conditions.

Overseas companies to expand in north-west

Two-thirds of overseas companies with factories in the north-west interviewed in a recent research exercise intended to expand in the region. Senior executives of nearly 200 of the region's 600 overseas companies were interviewed by telephone in a survey commissioned by the North-West Industrial Development Association.

Only three of 114 companies set up since 1962 expressed any general dissatisfaction with the area. Productivity was generally lower in comparison with the companies' home countries, but lower overall costs compensated for this.

The association has also published a brochure entitled 'North West England – centre for international industry', listing the 600 foreign-owned companies in the region, and an eight-page tabloid newspaper 'International success' highlighting achievements of the companies.

Dangerous substances to be banned

Regulations banning the sale and use of dangerous substances in ornamental glitter lamps and of the flame-retardant chemical 'Tris' in clothes and linen are to be introduced.

Consumer safety organisations, local authorities and trade associations are being asked by the Department of Trade to comment on the safety proposals, which will implement an EEC directive.

The flame-retardant chemical 'Tris', which has been found to be carcinogenic, has already been banned in the UK for use in children's nightwear. Some of the chemicals used in glitter lamps, if fumes are allowed to escape, have anaesthetic properties.

Copies of the proposals are available from the Department of Trade, Consumer Safety Unit, Millbank Tower, Millbank, London SW1.

Design Council awards closing date extended

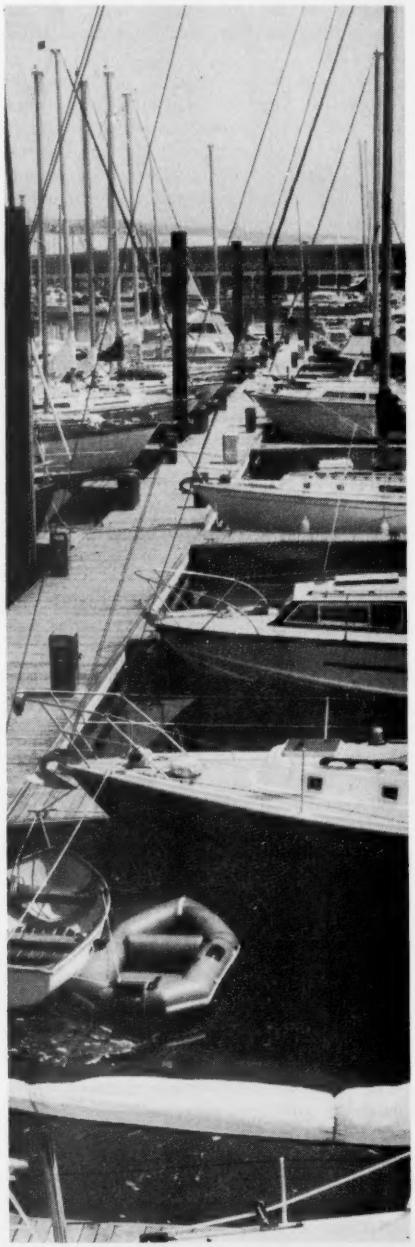
Closing date for submissions for 1980 Design Council awards has been extended to 31 August to give companies in the engineering, medical equipment and motor industries more time to complete their entries. Products and equipment designed and manufactured in the UK are eligible and manufacturers may make more than one submission. A company which has already won a Design Council award is not excluded automatically from winning again.

Brighton marina wins tourism trophy

Brighton marina – claimed to be Europe's largest yacht harbour – has been judged Britain's outstanding tourism development in 1978.

At a ceremony in London recently, Sir Henry Marking, chairman of the British Tourist Authority, presented the Brighton Marina Company with BTA's Come to Britain trophy. Awarded annually, the trophy goes to the organisation, company, local authority or individual judged to have introduced the year's best new service.

The Brighton marina, which offers amenities for the general public as well as boating enthusiasts, has 2200 berths, shops, cafe and the terminal for the cross-channel Seajet service.



Monopoly in electricity meter industry

Trade secretary John Nott is to take action on a report concluding that a monopoly in the electricity supply meter industry operates against the public interest.

The Monopolies and Mergers Commission report on the supply and export of electricity supply meters, published on 8 August concludes that in regard to supply in the United Kingdom a complex monopoly situation exists in favour of GEC Measurements Ltd and Sangamo Weston Ltd and operates against the public interest; a scale monopoly situation in favour of Landis and Gyr Ltd does not.

On exports, scale monopoly situations exist in favour of both GEC Measurements and Landis and Gyr and a complex monopoly situation exists in favour of the four UK manufacturers (GEC Measurements, Sangamo Weston, Landis and Gyr and Ferranti Instrumentation Ltd). None of these export monopolies operates against the public interest, however.

The commission has made recommendations designed to remedy the adverse effects resulting from the United Kingdom complex monopoly situation.

Mr Nott has accepted the commission's conclusions, and intends to ask the Director General of Fair Trading to discuss with the parties, in the light of the commission's recommendations and other suggestions, the action that should be taken and the undertakings to be given by the parties to remedy the adverse effects on the public interest.

Commission recommendations

In examining the possibilities for remedial action for the effects of the home complex monopoly situation, the commission considered first a price agreement (under which the four manufacturers have, since 1971, been obliged to notify new prices to each other shortly after informing customers of them). It did not think that this was at present a significant factor in price determination, but that it could have this effect and was in principle undesirable. The commission accordingly recommended that the 1971 price notification agreement should be terminated.

More important, the commission thought, was the fact that positive steps were needed towards more active price competition. This depended on the relationship between buyers and sellers. The commission thought that the area boards had carried to excess their concern that by putting pressure on prices they might be risking a deterioration in quality and that the present method of ordering paid too much attention to their requirements. It also thought that there might be scope for the boards to commit themselves to a more even flow of meters and thus be in a stronger position to bargain for price concessions. It recommended that the area boards should reconsider their buying policies and ordering procedures in certain respects.

In addition, the commission noted that meter specifications were not the same for all boards and that meter testing was undertaken both by manufacturers before delivery and by boards before meters were put into service. It suggested that there was a case for greater co-ordination of specifications and that changes in meter testing, already being considered by the industry, should continue to be pursued.

Company inspectors' reports published

Burnholme and Brayhead

The inspectors' report on Burnholme and Forder Ltd and Brayhead Ltd was published by the Department of Trade on 17 July. The inspectors, Thomas Dillon, and Dennis Garrett, were appointed on 2 December 1974 under section 165(b) of the Companies Act 1948, as amended, to investigate the affairs of Burnholme and Forder Ltd. On 12 September 1975, they were similarly appointed to investigate the affairs of Brayhead Ltd.

A compulsory winding-up order was made against Brayhead in the High Court on 1 December 1975 and the Official Receiver is the liquidator of the company. On 9 December 1977 a winding-up order was made against Burnholme and Forder in the High Court. Mr I. G. Watt of Thompson, McLintock and Co is the liquidator of the company.

The inspectors completed their investigation on 12 April 1977 and submitted their report to the Secretary of State for Trade in August 1978 after allowing certain witnesses a full opportunity to make representations following the inspectors' provisional criticisms of those witnesses.

Copies of the report are available from HMSO, price £5.25.

Ashbourne Investments

The inspectors' report on Ashbourne Investments Ltd was published on 31 July. Copies are available from HMSO, price £8.75.

Robin Ernest Auld and Hubart Harold de Courcy Moore were appointed on 10 July 1975 under sections 164 and 172 of the Companies Act 1948, as amended, to investigate the affairs of Ashbourne Investments and to investigate the ownership of the company. On 22 January 1976, Ian Bernard Glick, a barrister, was appointed to act as an additional Inspector in the investigation.

The appointment was made following the application of shareholders under the provisions of section 164(1)(a) and section 172(3) of the Companies Act 1948.

Double glazing company promises to mend its ways

An Essex double glazing company has promised Gordon Borrie, Director General of Fair Trading, that it will treat its customers fairly in future.

Everite Aluminium Windows and Doors Ltd and Everite Sliding Doors Ltd, both of Hornchurch, together with the then directors of the two companies, George Everitt and Irene Everitt, gave written assurances of future good behaviour. While the former company went into liquidation in April 1978 the directors' assurances are binding upon them in any other business with which they may be concerned.

The director general has been assured by the present directors of Everite Sliding Doors that the company is now under new control.

Everite Aluminium Windows and Doors was sued four times in the years 1976 to 1978 by customers, three of whom complained that double glazing work had not been completed satisfactorily, the fourth stating that goods had never been delivered.

In asking for assurances under part 3 of the Fair Trading Act, the director general also took into account complaints from a further 26 customers, in London and the south east, who paid over £9,660 for double glazing or replacement windows and doors.

Staff appraisal guide

'Appraisal and appraisal interviewing', a new training guide for managers, has been published by the Distributive Industry Training Board. It covers the design of appraisal and performance measurement schemes, methods of communication, the training of appraisers, the implementation of a scheme and analysis and review. The guide also contains examples of simple stationery.

Employers are entitled to a free copy of the guide, and extra copies can be obtained at 75p each. Requests should be sent to the Sales Department, DITB, MacLaren House, Talbot Road, Stretford, Manchester M32 0FP.

Official appointments

John Nott, Secretary of State for Trade, has appointed Jocelyn Stephenson as deputy chairman of the Northern Gas Consumers' Council until 31 March 1982. She has been a member of the council since 1973.

Mr Nott has appointed Eric Feben as chairman of the Transport Users' Consultative Committee for the South East from 1 August 1979 until 31 July 1982. Mr Feben has been a member of the committee since 1963 and was its deputy chairman from 1975 to 1978.

Merger proposals cleared

John Nott, Secretary of State for Trade, has decided, on the information at present before him, not to refer the proposed acquisition by BICC Ltd of Vero Electronics Ltd and Vero Precision Engineering Ltd to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973.

Mr Nott has also decided not to refer the following proposed mergers to the commission:

Rockware Group Ltd/the non-US plastic container interests of Dart Industries Inc.

Scottish and Newcastle Breweries Ltd/Gough Brothers Ltd.

Redman Heenan International Ltd/Wellman Engineering Corporation Ltd.

Milk Marketing Board of England and Wales/certain assets of Unigate Ltd.

Company Profits

This paper was presented by the Secretary of State for Industry at the latest meeting of the National Economic Development Council. It discusses the profit performance over the last two decades of United Kingdom industrial and commercial companies, with special reference to manufacturing companies, as measured by the pre-tax rate of return on capital employed and by the share of profits in national income or the income of the corporate sector. This is followed by an outline of other countries' performance and of some of the causes and consequences of declining profitability. 'Profits' in this paper are on a replacement cost accounting basis: rises in stock values due purely to price increases are not counted as profits, and depreciation is provided for on the basis of the cost of replacing capital equipment. These 'real' figures are much lower, and show a far steeper decline, than the traditional 'historic cost accounting' figures, which are very misleading in their failure to show the effect of inflation.

UK performance

On either measure of profitability, the UK profits performance has worsened considerably since the early 1960s. Table 1 and the chart for example show the share of 'real profits' in UK domestic income since 1960. For all industrial and commercial companies, profit share has declined from 15 per cent in 1960 to 8 per cent in 1978. If profits from North Sea oil are excluded, the 1978 figure is lower still, at 7 per cent. The position for the manufacturing sector has shown a similar decline from 10 per cent in 1960 to 3 per cent in 1978. Table 2 and the chart show rates of return since 1960. Pre-tax profitability for all industrial and commercial companies had declined from 14 per cent in 1960 to 5½ per cent in 1978. Excluding North Sea oil the decline is to 4½ per cent. For the manufacturing sector, which has throughout shown a poorer rate of return than that for all industrial and commercial companies, the decline has been from 13 per cent to 3½ per cent, with a lower point of only 1½ per cent in 1974. The equivalent figures after tax reveal a broadly similar situation. (Bank of England estimates for real pre-tax returns on equity are higher than returns on total capital employed but show a similar decline.)

Individual figures for profits share and rates of return should be treated with considerable caution. In particular large margins of error attach to estimates of capital employed; and a small part (not more than one or two percentage points) of the decline in the profits share reflects a fall in the size of the company sector in relation to the economy as a whole. The figures also show cyclical fluctuations. Nonetheless the downward trend over the past two decades is unmistakable.

Table 1 **Share of profits in total domestic incomes** [1]

After deducting stock appreciation and capital consumption

Per cent

	Industrial and commercial companies		
	Including North Sea activities	Excluding North Sea activities	Private manufacturing
1960	15.5		10.0
1961	13.7		8.6
1962	12.8		7.9
1963	13.8		8.3
1964	14.2		8.6
1965	13.6		8.2
1966	12.1		7.2
1967	12.0	12.1	7.0
1968	12.0	12.1	6.9
1969	12.0	12.1	6.8
1970	10.6	10.6	5.6
1971	10.7	10.8	5.7
1972	10.7	10.7	5.5
1973	9.4	9.5	4.7
1974	5.4	5.7	1.3
1975	4.7	5.0	1.5
1976	5.5	5.5	1.9
1977	7.5	6.6	3.2
1978	8.3	6.9	3.2

[1] Gross trading profit plus rent received (rent taken as nil for manufacturing) less stock appreciation, less capital consumption at replacement cost, as percentage of total domestic income less stock appreciation, less capital consumption at replacement cost.

Table 2 **Real rate of return** [2] **before tax**

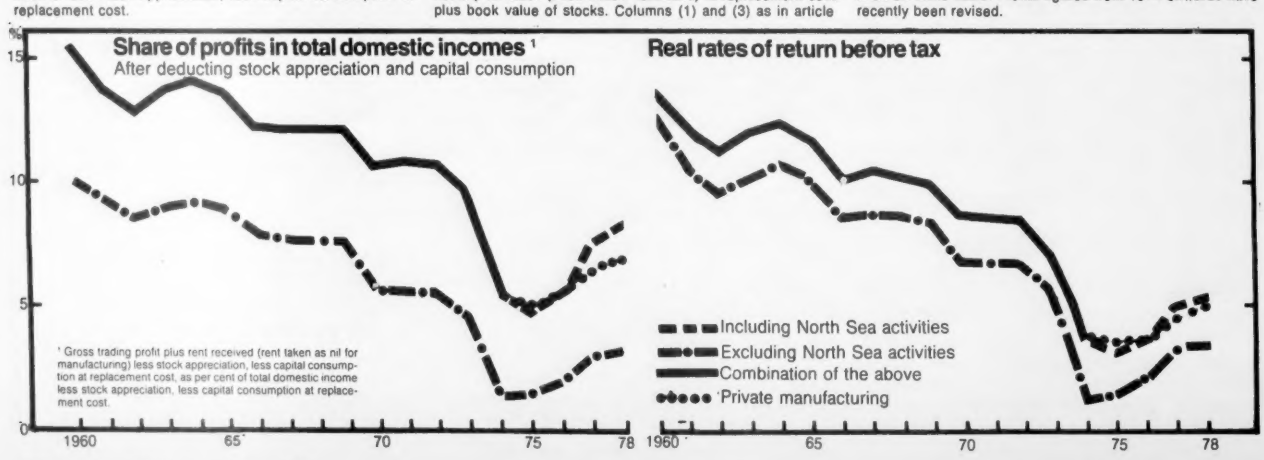
Per cent

	Industrial and commercial companies		
	Including North Sea activities (1)	Excluding North Sea activities (2)	Private manufacturing companies (3)
1960	14.2		12.8
1961	12.3		10.7
1962	11.2		9.7
1963	12.1		10.3
1964	12.5		10.8
1965	11.8		10.2
1966	10.2	10.3	8.7
1967	10.5	10.6	8.9
1968	10.3	10.4	8.8
1969	10.0	10.1	8.5
1970	8.7	8.7	6.8
1971	8.6	8.7	6.8
1972	8.5	8.6	6.8
1973	7.1	7.2	5.6
1974	3.7	3.9	1.4
1975	3.2	3.5	1.7
1976	3.7	3.8	2.1
1977	5.0	4.5	3.5
1978	5.4	4.7	3.5

[2] Based on national accounts data; columns (1)-(3) gross trading profits plus rent received less capital consumption at replacement costs and less stock appreciation as percentage of net capital stock (fixed assets less land) at replacement cost plus book value of stocks. Columns (1) and (3) as in article 'Companies rates of return on capital employed 1960 to 1977' *Trade and Industry*, 22 September 1978, and column (2) calculated on same basis. Profits figures from 1974 onwards have recently been revised.

International comparisons

The recently published report 'Profits and rates of return' compiled for the OECD by Professor C. P. Hill of the University of East Anglia represents the most thorough and systematic attempt to date to compare profit performance in different countries. The technical



task is however an extremely difficult one and it is clear that problems of comparability of data still remain. Again both profit shares and rates of return are used to measure performance for manufacturing industry and for 'industry plus transport' (that is, all industries except agriculture, distribution and services, the aim being to approximate to the non-financial corporate sector by omitting industries where unincorporated businesses were likely to be of importance). Figures are given both gross and net of capital consumption but comment in this paper is restricted to the latter. Figures are by definition after deduction of stock appreciation.

The OECD analysis gives net figures for nine countries but for simplicity of presentation only five are shown in tables 3 to 6 although the comment below covers all of them [1]. The figures in these tables are based largely on the OECD report as published but include some revised and updated figures for recent years prepared by Professor Hill too late for inclusion. For the broader industry group for West Germany and for rates of return in manufacturing in the United States, Department of Industry estimates have been substituted; the United States figures are not exactly comparable with those of other countries and the West German rates of return are very rough estimates, but in both cases it is believed that they provide a better comparison than the original data (for reasons spelt out in more detail in the notes to the tables). The United States figures in the other tables may also be slightly too high.

Tables 3 and 4 show profit shares for 'industry plus transport' and manufacturing respectively. Profit levels are compared with value added in the sectors examined, rather than against total incomes in the countries, thus eliminatng one possible source of distortion. The UK compares poorly on this measure; although many countries display a falling trend, UK figures for industry plus transport have been the lowest throughout almost the whole period and for both this grouping and for manufacturing have fallen more steeply since 1973 than those of our competitors.

Tables 5 and 6 use the rate of return measure. For measurement of capital stock and hence for rates of return (which basically compare profits figures with the capital stock generating them) it is inherently more difficult to be sure of comparability between countries or even of the profit figures with the capital stock figures for any one country. The latter point is more likely to be a problem at a disaggregated level and, because of this and the fact that some estimation was often required to obtain the necessary industry breakdown of net capital stock, estimates for manufacturing are probably more suspect than for the broader industry group. It has already been mentioned that the United States figures for manufacturing are suspect and, as there could turn out to be similar problems in other figures, we can probably say little more on rates of return than that the broad trends over time which are shown are probably correct and that the UK has lower rates of return than most other countries. (Note that these UK rates of return are calculated on a slightly different basis from that used in table 2.)

The broad conclusion is that most countries

[1] In addition to the countries in the tables, rates of return are given for Sweden and, up to 1972 only, Italy, and profit shares for Sweden, Italy, Australia and Netherlands.

International comparisons of profitability 1975-77

Table 3 Profit shares [1] industry plus transport [2]

Per cent

	Canada (1)	United States (2)	Japan (3)	West Germany (4)	**United Kingdom (5)**
Averages for years [3]:					
1955-58	30.3	26.7	33.9	n.a.	**22.3**
1959-62	28.7	26.2	37.3	(34)	**22.6**
1963-67	29.6	26.9	33.9	(30)	**22.3**
1968-71	27.0	23.5	36.1	28.5	**20.9**
1972-75	28.1	22.3	28.1	22.9	**15.6**
Years:					
1975	25.3	23.2	26.3	20.7	**10.0**
1976	26.0	23.9	25.4	(23)	**13.0**
1977	26.2	23.7	n.a.	n.a.	**16.0**

[1] Defined as net operating surplus as percentage net value added in the industries. [2] That is, manufacturing, mining, construction, public utilities and transport and communications. [3] Each of these groups of years covers a cycle in UK rates of return (although 1955-58 is probably not a complete cycle). Figures for other countries for the same years may cover more or less than a complete cycle and in this sense can only provide a broad comparison with UK. n.a. Not available.

Source: Professor Hill's study for OECD (with recent years revised by Professor Hill) except for column (4) Department of Industry (see note below).

Note on West German figures

Because of the limited data on capital stock and hence what could be calculated on rates of return, the OECD figures for West Germany were calculated for a wider group of industries (including finance, real estate, services) than other countries. Figures have recently become available which enable profit shares for the same industries as for other countries to be calculated for some years and these form the basis of column (4). Figures in parentheses are partly estimated.

Table 4 Profit shares [1]: manufacturing

Per cent

	Canada (1)	United States (2)	Japan (3)	West Germany (4)	**United Kingdom (5)**
Averages for years [2]:					
1955-58	30.8	20.1	38.9	35.2	**27.9**
1959-62	27.9	21.1	42.1	31.9	**26.3**
1963-67	27.7	23.4	38.9	27.4	**24.3**
1968-71	24.4	19.6	40.5	26.2	**20.4**
1972-75	26.7	19.5	31.1	18.3	**12.1**
Years:					
1975	25.1	20.5	29.1	16.8	**5.2**
1976	23.3	22.0	27.9	19.5	**6.5**
1977	22.3	21.8	n.a.	19.0	**10.1**

[1] Defined as net operating surplus as percentage net value added in the industry. [2] Each of these groups of years covers a cycle in UK rates of return (although 1955-58 is probably not a complete cycle). Figures for other countries for the same years may cover more or less than a complete cycle and in this sense can only provide a broad comparison with UK. n.a. Not available.

Source: Professor Hill's study for OECD (with recent years revised by Professor Hill).

Table 5 Net rate of return [1]: industry and transport [2]

Per cent

	Canada (1)	United States (2)	Japan (3)	West Germany (4)	**United Kingdom (5)**
Averages for years [3]:					
1955-58	14.3	23.0	14.1	n.a.	**10.6**
1959-62	11.4	21.9	19.0	(26)	**10.6**
1963-67	11.8	23.9	17.9	(20)	**10.1**
1968-71	10.2	18.8	20.0	(19)	**8.5**
1972-75	10.4	16.5	11.8	(14)	**5.8**
Years:					
1975	8.5	16.5	10.5	(12)	**3.5**
1976	8.8	18.1	n.a.	(13)	**4.3**
1977	8.7	n.a.	n.a.	n.a.	**5.2**

[1] Defined as net operating surplus as percentage net capital stock of fixed assets (excluding land). [2] That is, manufacturing, mining, construction, public utilities and transport and communications. [3] Each of these groups covers a cycle in UK rates of return (although 1955-58 is probably not a complete cycle). Figures for other countries for the same years may cover more or less than a complete cycle and in this sense can only provide a broad comparison with UK. n.a. Not available.

Source: Professor Hill's study for OECD (with recent years revised by Professor Hill) except for column (4) Department of Industry (see note below).

Note on West German figures

The note to table 3 points out that the OECD West German figures relate to a broader industry group than described because of the availability of capital stock figures for calculating rates of return. The figures in column (4) are very rough estimates based on the relationship between the figure in column (4) of table 3 and those in the OECD report and in effect assume that capital productivity in the extra industries is the same as in the industries defined as 'industry plus transport'. Although very rough, the estimates are thought to provide a better comparison with other countries than the original figure.

Table 6 Net rate of return [1]: manufacturing

Per cent

	Canada (1)	United States (2)	Japan (3)	West Germany (4)	**United Kingdom (5)**
Averages for years [1]:					
1955-58	23.2	24.8	24.4	28.2	**17.4**
1959-62	18.8	24.8	31.1	23.9	**15.9**
1963-67	18.5	31.7	26.7	18.7	**13.6**
1968-71	15.5	21.6	28.4	19.0	**10.7**
1971-75	17.0	17.4	15.7	12.5	**5.6**
Years:					
1975	14.5	14.5	13.9	11.0	**2.1**
1976	13.3	18.1	n.a.	13.5	**2.5**
1977	12.5	19.0	n.a.	13.3	**3.9**

[1] Defined as net operating surplus as percentage net capital stock of fixed assets (excluding land). [2] Each of these groups of years covers a cycle in UK rates of return (although 1955-58 is probably not a complete cycle). Figures for other countries for the same years may cover more or less than a complete cycle and in this sense can only provide a broad comparison with UK. n.a. Not available.

Source: Professor Hill's study for OECD (with recent years revised by Professor Hill) except for the figures in column (2) which are the Department of Industry's estimates. Although not on exactly the same basis as other countries' figures, they are thought to provide a better comparison than the original OECD figures in which, it is believed, the coverage of the net operating surplus was not fully consistant with that for capital stock.

Company pro£its

again show a falling trend and that for manufacturing industry the decline is particularly steep in UK and Germany. France was not covered by this study but a comparison [2] of UK and French rates of return in manufacturing industry excluding food, drink and tobacco and metal manufacturing in the period 1956-75 suggests that the trend in France was, if anything, slightly upwards. At the beginning of the period UK rates were not much below the French but by 1970 they were well under half the French level.

Causes of decline

There is no single or generally accepted explanation for the long-term fall in British company profitability. It is possible to explain some of the cyclical changes: for example the particularly sharp fall between 1973 and 1975 reflects a combination of accelerating wage costs and recession. What is much more difficult to understand is the trend decline in profitability and profits shares since the early 1960s. A number of possible explanations has been advanced. The difficulty is in choosing between them and in finding any evidence to support them other than the phenomena which they are supposed to explain.

The simplest explanation is that the fall in the rate of return has been the 'inevitable'

result of continuing investment. There are however two things wrong with this idea. First, technical progress can be expected to create new opportunities for profitable investment. Secondly, most other countries do not appear to have shown as marked a long-term decline as the UK.

Alternatively it is suggested that the cost of capital has fallen, leading to a fall in the rate of return at which it is profitable to use capital equipment. This idea has some attraction as it helps to explain the common experience of falling profitability in many countries. Even so the evidence to support such a theory is very sketchy.

Another possibility is increasing international competition and a fall in the market power of monopoly buyers and sellers who may in the past have been able to secure for themselves high rates of profit. International competition also plays a part in arguments which seek to explain the fall in profitability by changes in costs, particularly wage costs. It is suggested that an increase in trade union power may have squeezed profits by securing higher money wages which could not be fully passed on in prices because of international competition. However, it is unclear how important such cost-push factors have been over the longer term. Furthermore the theory cannot explain why profit share in the UK seems to have fallen at a faster rate than experienced overseas, despite exchange rate adjustments which until recently have more than maintained the UK's labour cost competitiveness. Finally it is proposed that the growth of the public sector might in some way have starved

[2] 'Profitability in Britain and France 1956-75: a comparative study' by M. A. King and J. Mairesse, University of Birmingham, Faculty of Commerce and Social Science, discussion paper series B number 53.

Profitability and investment – NEDC's view . . .

The introduction and summary of the NEDC director general's memorandum at the meeting of the NEDC is as follows:

The paper presented to the council at its June meeting on 'trends in UK industrial performance' drew attention to the fall in the real profitability of British industry since the early 1960s, but concluded that it was difficult to disentangle symptom from cause. A low level of profitability on new capital discourages investment; this limits the speed of product and process change, which in turn depresses future profitability.

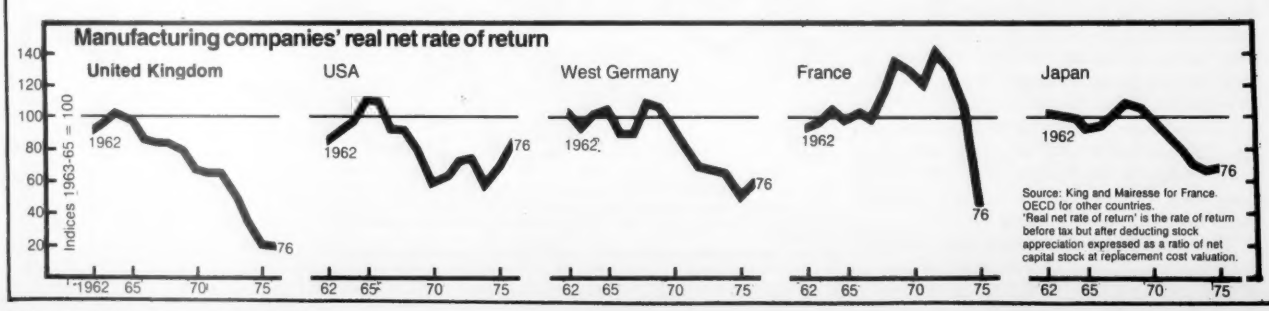
The rate of profit has fallen in all major industrial countries but further in the UK. The share of profit in corporate value added, however, has been stable elsewhere, but not in the UK where it has fallen steadily. There are common factors in all countries, the impact of which has been particularly severe in the context of UK industrial performance.

The ratio of investment to the value of output is not particularly low in the UK. But because the UK level of productivity (in the sense of output per man employed) is now very low, then so, inevitably, is new investment per man.

The level of productivity depends on all the factors discussed at the July council, including the quantity and type of capital equipment. Increased investment per man might help to raise productivity over a number of years, but only if the composition of that investment is suitable. Modernisation would help; simple capacity expansion might not.

Past profitability affects mainly the supply of investible funds and expected profit affects mainly the motive to invest.

The low level of all factor productivity lies at the core of the problem of the particularly low UK rate of profit. The quality of the existing capital stock itself affects that productivity. Policy measures need to be directed to a qualitative improvement of the capital stock (in up-to-dateness and market relevance). A great deal of investment in replacement and modernisation is required, but this just at a time when the dominant motives to invest are weak



How can we jack them up?

the private sector of resources, including both labour and finance. Again, the evidence to date is weak, but further investigation of most recent data is continuing.

In conclusion, while it is impossible to demonstrate beyond any doubt the causes of the UK's declining profitability, there are numerous potential explanations for the UK's poor performance relative to other countries.

Consequences of declining profitability

The rates of return and profit share data set out above relate to average levels. In deciding whether to carry out a project however companies will typically be concerned with expected returns from the project under consideration. It is possible that low profitability on average is taken as an indicator of profitability at the margin, ie the prospective return on a new investment project. There is no econometric evidence for a systematic relationship between average and marginal profitability; the latter is probably much more responsive to future economic conditions, such as prospective demand, competition and spare capacity. Nonetheless it is hard to believe that expectations about future investment are not strongly influenced by experience of projects undertaken in the past.

The probable consequences of declining profitability may be divided into short run and long run. In the short run if production is unprofitable, firms may be unwilling or unable to increase output to meet an increase in demand: unwilling because they do not believe the extra business will yield profits, or unable because a low profit record has starved them of internal funds for working capital etc and made it harder for them to raise external funds. Low profitability might thus constitute a reason for some of the rigidities on the supply side of the UK economy. The long run effects relate mainly to levels of investment in industry; firms nowadays may feel less inclined to undertake investment in the United Kingdom if that investment is likely to yield what are, by comparison with past (and probably current international) levels of profitability, very low rates of return. The depressive effect of low profits upon liquidity and borrowing-power is another obstacle to investment.

Conclusions

It is difficult to separate the decline in the British profitability and profit shares from other aspects of our poor economic performance; and falling profitability should perhaps be seen as a symptom as well as a cause of the performance. The government recognises however that profitability in British industry is too low, especially in manufacturing industry.

The government's economic policies are intended to make it possible to reverse the decline in the British economy and in the profitability of British industry.

and the CBI's

Sir John Greenborough, president of the Confederation of British Industry, presented a memorandum at the recent meeting of the NEDC on 'Profitability and investment – the short-term outlook'. Sir John's introduction is printed below.

The CBI has repeatedly argued the importance of an adequate rate of profit, after adjustment for inflation, for the future prosperity of and expansion of employment in British trade and industry and, therefore, for improvement of the living standards of all our people. We have also made the point on many previous occasions that the future development of public services rests on industrial and commercial success.

In our policy document 'Britain means business 1978' we said that adequate profitability is essential if there is to be adequate investment in the widest sense, including not only fixed assets and working capital, but also training of manpower at every level, research and development, design and all the many facets of marketing. The paper on productivity from the director general of Nedo considered by the council at its last meeting in July was very much concerned with the need for more investment in this broad sense. In the discussion of that paper, I emphasised the need for companies to earn sufficient profits to be able to pay for the extra R&D, product design, cost control, quality control and marketing effort which it recommended.

The connection between real profitability and investment other than in fixed capital, and stocks, cannot easily be measured. But the data are available to demonstrate that there is a close relationship between changes in real rates of return and investment expenditure in the narrower sense – that is, in plant, machinery and buildings.

As we said in 'Britain means business 1978', the relationship is hardly surprising. Business expectations about the profitability of future sales and investment are considerably influenced by the rate of return achieved on earlier investment. Also, past profits are usually a major source of funds for new investments.

The wider implications of this relationship are clear. All parties to the NEDC subscribe to the aims of beating inflation, not least by curbing the increase of unit costs, and of raising our international competitiveness. We are all agreed that this is essential to providing more jobs and improving living standards. Success on all these fronts requires investment, in both fixed capital and human resources. This must be top-quality investment, applying the latest technologies. It must be utilised to maximum efficiency. To the extent that this investment is conditional on British business earning adequate rates of return, any deterioration in real profitability puts those broader aims at risk.

Government measures to stimulate profits

From *Economic Progress Report*, July 1979

The government has stated its belief that a vigorous, profitable and expanding company sector is essential to rebuild the country's prosperity. Without higher profits there will not be the new investment and jobs which are so urgently needed. The budget, introduced on 12 June contained a number of measures specifically designed to assist companies in achieving those profits:

Stock relief. This is the scheme whereby tax relief is given to companies on the increase in the cost of replacing stocks. The deferred tax liabilities arising from stock relief given for the first two years of the scheme 1973-74 and 1974-75 are being written off. Relief for each subsequent year will be written off after six years.

Divident controls. Dividends were subject to a maximum annual increase of 10 per cent; controls ended when the existing legislation expired on 31 July 1979.

Corporation tax. The qualifying profits limits for small companies (below which the 42 per cent rate of corporation tax applies) is being raised from £50,000 to £60,000 with an increase in the upper limit (above which 52 per cent applies) from £85,000 to £100,000.

These changes are part of an overall package (see *Economic Progress Report* June 1979) designed to strengthen incentives at all levels and allow people to keep more of what they earn so that hard work, talent and ability are properly rewarded.

'Profitability has dropped sharply in recent years and the rate of return on capital employed is now far too low. This is especially true of manufacturing industry. Without higher profits we shall not see the new investment and jobs which are so urgently needed. Achieving those profits is very largely the task of management and work people. The government can help or hinder them, and this is no time to add to the difficulties that they face by raising taxes on profits still further. Against that background I propose no change this year in the general system or in the rates of corporation tax. Nor would it be right to make any major changes in the system of company taxation without careful consultation in advance.'

Chancellor of the Exchequer in his budget speech.

Company pro£its

How they are allocated and used

A company s level of profits not only reflects its trading success but also represents the principal source of internal funds to undertake the investment needed to replace and increase stock and fixed capital assets and thus finance its expansion. The profitability of industrial and commercial companies as a whole has obvious implications for the prosperity of the country creating increased opportunities for employment, greater output and higher living standards. This article, published in *Economic Progress Report*, July 1979, explains how profits are allocated, and how they are used.

Composition and allocation of company income in 1978

The composition and allocation of the income of industrial and commercial companies in the UK in 1978 is shown in table 1. For these companies trading profits represent the chief source of income. In 1978 they accounted for over 80 per cent of companies' income while rent and non-trading income (consisting mainly of interest paid on bank deposits) accounted for only 8 per cent. Income from abroad consists of income from investments overseas mainly that from overseas subsidiaries of UK firms.

Interest payments on debt represented the largest part of company allocation of income. Taxes on income include both corporation tax (at 52 per cent for most companies) and advance corporation tax, a withholding tax on dividends which shareholders can credit against their individual income tax liability and which companies can offset against their corporation tax liability. In computing tax liability various reliefs are allowed for fixed investment; relief for stock appreciation is also deducted. In recent years rapid inflation has led to large increases in the value of companies' stocks and thus to large entitlements to stock relief. Together with 100 per cent first year allowances on plant and machinery the effect in many manufacturing companies has been to remove all liability to corporation tax payments other than the advance corporation tax paid on dividends.

Distribution of dividends

Dividends represent that part of profits which the company decides to distribute to ordinary shareholders. The level of dividends will largely be set by the success of the company's trading activities although since the company will wish to encourage shareholders to retain or acquire its shares it will try to ensure that dividends are maintained at an adequate level. If the company reduces or fails to pay a dividend its share price will fall and it would have difficulty raising fresh capital.

In recent years the pattern of ownership of company shares has changed considerably. There has been a steady reduction in the number of individual shareholders and an increase in the influence of institutional investors, particularly insurance companies and pension funds. Table 2 shows the broad trends in the distribution of beneficial share ownership (that is, the actual owners of the shares, rather than the registered owners who could be, for example, nominee companies) as shown in a survey by the Department of Industry (*Economic Trends*, September 1977). Thus holdings by unit trusts and pension funds are recorded as financial companies and institutions rather than as holdings by the individuals on whose behalf the funds are invested.

Table 2 **Distribution of market value of shareholdings by sector of beneficial holder**

31 December 1963, 1969 and 1975

	Per cent		
	1963	1969	1975
Sector of beneficial holder			
Direct holdings of personal sector	57.5	50.9	40.2
Financial companies and institutions	29.0	34.5	47.7
Industrial and commercial companies	5.1	5.4	3.0
Public sector	1.5	2.6	3.6
Overseas sector	7.0	6.6	5.6
Total	100.0	100.0	100.0

The survey covered only ordinary shares listed on the stock exchange. Unlisted shares, most of which are probably owned by individuals, other industrial and commercial companies and parent companies overseas, are not covered. Thus the information given in table 2 cannot be directly related to the allocation of company income given in table 1. The table illustrates the fall in the proportion of total market value held by the personal sector, from about 58 per cent in 1963 to about 40 per cent in 1975 and the almost equivalent increase from 29 per cent to about 48 per cent in the proportion held by financial companies and institutions.

This change reflects in part the tax advantages of saving through life assurance and pension funds.

Table 1 **Composition and allocation of company income**

Industrial and commercial companies in the UK, 1978

Composition of company income	£ million	Per cent (rounded)	Allocation of company income	£ million	Per cent (rounded)
Income arising in the UK			Profits due abroad (net of UK tax)	1 714	7.3
Gross trading profits			UK taxes on income (payments)	2 446	10.4
After deducting stock appreciation	15 901	67.3	Dividends and interest, etc		
Stock appreciation	3 171	13.4	Dividends on ordinary shares (net of UK tax)	2 706	11.5
			Other	4 047	17.1
Total	19 072	80.7	Total	10 913	46.3
Rent and non-trading income	1 892	8			
Income from abroad (net of taxes paid abroad)	2 637	11.2	Balance: undistributed income	12 688	53
Total income	23 601	100.0	Grand total	23 601	100.0

Source: *Financial Statistics*.

Financing fixed capital investment

As table 1 shows, the gross undistributed income or retained profits of £12,688 million left to companies in 1978 consisted of the sum of rent and non-trading income, net income from abroad and net trading income after payment of taxation, debt servicing and distribution of dividends. These retained profits, together with loans and shares, constitute the three principal sources of funds for companies wishing to purchase new capital equipment and finance expansion. Fixed investment is usually the largest item of expenditure as companies must be able to finance the replacement of existing assets if they are to maintain the substance of their business.

Retained profits have obvious advantages over external funds as a means of financing fixed investment as they do not create a further prior interest charge against profits. However, they are not 'costless' as the company has to earn a sufficient income on its equity capital to maintain its stock-market valuation relative to other companies. The return has also to be compared with the equivalent income from investing the funds in financial or other assets.

Profits are an important factor in the ability of companies to raise additional external finance through borrowing or share issues. Both loans and the issue of shares can have disadvantages compared with retained profits. Loan debt involves the company in the obligation to repay the loan over a fixed period and to service the loan sometimes by paying a fixed amount of interest during the term of the loan (borrowing undertaken at a time of high inflation can leave the company exposed to the risk of a higher real cost of the debt than anticipated as the rate of inflation goes down). The success of a share issue will depend very much on the general state of the market for shares as well as on the characteristics of the company wishing to raise capital. Many small private companies finance their investment entirely out of retained earnings while rapidly expanding companies often use new share issues to meet their financing requirements. Of course, a company which already has a good profits record with a reputation for regular dividend payments will face little difficulty in raising money, except at times when stock market confidence is generally low.

The choice between using share issues or loans to raise capital will also depend on the capital structure of the company and what is seen as an acceptable ratio between the various sources of funds. This ratio will vary be-

tween companies depending to a large extent on the nature of the business and in particular the liquidity of assets. The ratio of loans to equity is known as 'gearing' and this relationship is traditionally regarded as one indicator of financial risk.

Profitability and financial balances

Profitability (defined here to mean the ratio between net trading income and net capital stock) in British industry has fallen sharply in recent years. In the mid-1960s the average real rate of return on capital earned by industrial and commercial companies was about 12 per cent. In every year since 1974 it has been less than 5 per cent when earnings from the North Sea are excluded.

Figures published in *Trade and Industry*, 22 September 1978, show that the profitability of all industrial and commercial companies taken together is estimated to have risen slightly in 1977 when measured in real terms, that is, when increases in the value of stock which companies hold but must replace (stock appreciation) are not counted as profits and when depreciation is calculated on the basis of what it would cost to replace companies' fixed assets rather than on the basis of what they cost when they were purchased. The rate remained though at an historically low level. The rise over the previous year is, however, halved if the North Sea exploration and production activities of these companies, which began to generate substantial profits in 1977, are excluded. Estimates published in the October 1978 issue of *Economic Progress Report* showed that total royalties plus profits before tax from North Sea oil are expected to rise from £2,900 million in 1978 to £7,200 million in 1985.

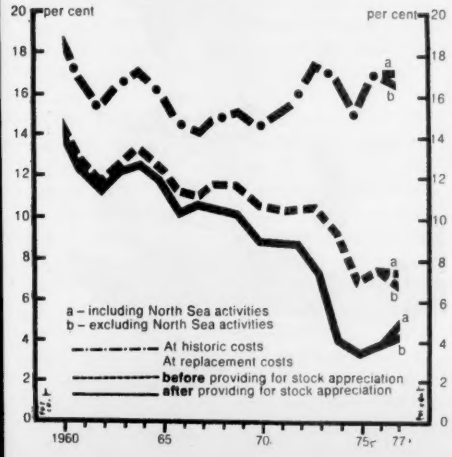
The chart shows the rate of return on capital for industrial and commercial companies at historic costs and at replacement costs after providing for stock appreciation. The increase for 1977, as can be seen, raises the levels of the real rates of return to about half their levels in the early 1970s or to about a third of the levels in the 1960s. Although profitability is subject to cyclical variations it is too early to say whether the rise in 1977 marked the start of a reversal of the long-term decline or a revival from the severe depression of the mid-1970s.

In determining the current financial position of companies, two alternative measures are used in the national accounts. The principal method is the net acquisition of financial assets (NAFA) which is the amount by which companies are in surplus or deficit after deducting domestic expenditure on physical assets from undistributed income plus net capital transfers. The other, newer measure is the net borrowing requirement (see *Economic Trends*, December 1978). This measures the amount by which companies' expenditure on fixed assets, stocks, trade investments, acquisition of UK subsidiaries, investment abroad and net trade credit extended exceeds the increase in their internal funds; in other words, their need for external finance, net of financial assets. Figures for 1978 show that the net acquisition of financial assets for companies was in deficit by £2,300 million compared with £1,800 million in 1977. However, according to the net borrowing requirement there was a much smaller deterioration from £1,700 million in 1977 to £1,800 million in 1978. Although these two indicators present a somewhat different picture it is clear that the company sector is in financial deficit, as is normal (industrial and commercial companies typically borrow from the personal sector and financial institutions to finance their activities) but that the deficit is much smaller than it was during the financial problems of 1974.

Current cost accounting

In the discussion of company profitability above, a distinction was made between profitability calculated on a historic cost basis and 'real' profitability. The introduction of current cost accounting (CCA), on the lines set out in the exposure draft published by the Accounting Standards Committee on 30 April 1979, would mean that companies' published accounts would also give a measure of real, inflation-adjusted profits. The government has announced that it will be reviewing the accountancy profession's latest proposals on CCA.

Industrial commercial companies rate of return on capital employed 1960–77



Industrial and commercial companies' current financial position

Appropriation account

Income of industrial and commercial companies is estimated to be £13.1 billion in the six months ending March 1979, £1.1 billion (9½ per cent) higher than in the previous six months. In this period gross trading profits rose more slowly (plus 7 per cent) than rent and non-trading income and income from abroad. Excluding stock appreciation, which rose by nearly half to £2.5 billion, profits were almost unchanged. While gross trading profits of the North Sea oil and gas sector continued to rise (volume sold and price were both up), profits of other industrial and commercial companies fell steeply in the first quarter of 1979 due to the effects of severe weather and industrial disputes.

Allocation of income amounted to £6.6 billion in the six months to the end of March 1979, £1.3 billion larger than previously, with most of the increase being accounted for by higher interest payments (reflecting the upward movement in interest rates) and higher payments of dividends on ordinary shares. Undistributed income is estimated to have been £6.6 billion in the six months to the end of March 1979, £0.1 billion lower than in the previous six months.

Net acquisition of financial assets

Measured by their net acquisition of financial assets, industrial and commercial companies are estimated to have had a deficit of £2.2 billion in the six months ending March 1979 compared with a deficit of £0.8 billion in the previous six months. This substantial rise in the deficit is due almost entirely to the fall in undistributed income (excluding stock appreciation) of £0.9 billion and an increase in stockbuilding of £0.5 billion. Expenditure on fixed assets was virtually unchanged.

The deficit in the first quarter of 1979 is estimated to be £1.6 billion, about £0.9 billion higher than in the fourth quarter of 1978. This is the highest seasonally adjusted quarterly deficit yet recorded by industrial and commercial companies although smaller in real terms than that reached in the second and third quarters of 1974.

Net borrowing requirement

The net borrowing requirement of industrial and commercial companies of £3 billion in the six months ending March 1979 (£2.8 billion in the first quarter of 1979) was £0.8 billion higher than the deficit of £2.2 billion indicated by the net acquisition of financial assets. This is the highest net borrowing requirement recorded over a six-month period since 1974, partly reflecting the industrial disruption in the first quarter.

The net borrowing requirement takes account of UK companies' expenditure on investment abroad and cash expenditure on trade investments and subsidiaries in the United Kingdom, which rose by £0.8 billion to £1.4 billion mainly due to increased profits earned and reinvested abroad by UK oil companies. On the other hand, companies' liabilities for taxes on expenditure and other accruals and for identified trade credit (net) rose by £0.8 billion after falling by £0.3 billion in the previous six months. It seems likely that the pattern of payments and the recording of transactions may have been affected by the abnormal conditions in the first quarter of 1979. These factors may account for the very large positive unidentified transactions of £1.1 billion in that quarter which more than offset the very large negative figure in the previous quarter, giving a small net positive value compared with the negative unidentified transactions of £0.8 billion in the previous six months.

The net borrowing requirement of £3 billion was financed by borrowing from UK banks of £2.6 billion (an increase of £0.8 billion over the previous six months) and borrowing from other sources of £1.7 billion, including sizeable borrowing by foreign-owned oil companies from their parent companies to finance their operations in the North Sea. The acquisition of liquid and other financial assets of £1.3 billion was more than accounted for by the increase in the fourth quarter of 1978, with a small reduction in liquid assets in the first quarter of 1979.

Inquiries: Central Statistical Office, Press and Information Service, Great George Street, London SW1P 3AQ, tel. 01-233 6135/6193.

New publications

Managing selling from A to Z

In an attempt to point salesmen on to the road to success, John Fenton, chairman and managing director of a group of companies, has written his 'A-Z of sales management'. Following along the same lines as his 'A-Z of industrial salesmanship', he leads the reader through his personal alphabet of hints to success from 'advertising and sales promotion' to 'zest for the job'.

Mr Fenton writes in a racy, colloquial style with a tendency to use short punchy sentences. Throughout, the text is a lively mix of amusing and useful illustrations. Among the latter are examples of forms for recording customer data, performance of the salesforce, and checklists with which the salesman can assess the efficiency of communications in his office and how well he apportions his time. The role of the individual sales manager is covered in depth, including detailed advice on his domestic personnel function (attitudes towards a variety of topics from company cars and expense accounts to leadswingers and moonshiners) as well as his technical function (organising exhibitions, sales literature, territories and targets).

The author says the book is written 'to separate the wood from the trees and provide guidance on the bare essentials of the task of managing an industrial sales operation'. Certainly Mr Fenton's down-to-earth approach makes for interesting and amusing reading.

The A-Z of sales management, by John Fenton. Heinemann, 1979. x, 140 pages; paperback £2.95 (ISBN 0 434 90558 5).

Success in industrial advertising

Although much has been written about advertising generally, its influence on the mass market and specifically on the consumer, guidance on industrial advertising has been lacking. Marketing industrial goods and services requires specialist knowledge. The market is generally a much more limited one and the style of approach required by those engaged in selling the product or service tends to be more technical and complicated, since one is dealing with customers in their own territory rather than a consumer.

In an attempt to illustrate the practical help available to the industrial manufacturer from the effective use of advertising agencies, the Institute of Practitioners in Advertising has produced a new series of guides entitled 'How to succeed in industrial advertising'. The first two publications in the series are now available.

The first booklet 'Getting the most out of the client-agency partnership' takes a general look at the industrial marketing scene, examining the marketing plan, the role of an agency and how much should be spent on advertising. A useful inclusion is a checklist on points to remember for a successful partnership.

Advertising can obviously be a costly business and must be carefully budgeted for. This forms the subject for the second booklet 'Getting the most out of the advertising budget' which provides a systematic approach to this type of budgeting.

The series which has been produced by an organisation not entirely disinterested in the use of advertising agencies, should however provide useful guidance for those unfamiliar with the types of services available. For those already using these facilities it provides help on their more effective use. And at so small an investment the series should prove of value.

Getting the most out of the client agency partnership, by Colin McIver. 'How to succeed in industrial advertising-1'. Institute of Practitioners in Advertising, 44 Belgrave Square, London SW1X 8QS. 1979. 32 pages; paperback, £1.00.
Getting the most out of the advertising budget, by Colin McIver. 'How to succeed in industrial advertising-2'. Institute of Practitioners in Advertising, 1979. 23 pages; paperback, £1.00.

Industrial change: Britain and West Germany

'While there are, of course, underlying similarities between the two countries – as there must be between any two advanced industrial nations – we have been struck by what we term the differing styles for resolving conflict adopted by each country both nationally and at enterprise level.'

These observations are borne out by examples of seven British and seven German case studies presented in a report on industrial change in the two countries carried out on behalf of the Anglo-German Foundation for the Study of Industrial Society.

The authors interviewed the management, unions and works councils of the enterprises selected with a view to determining how various industries – paper, steel, coal, insurance – coped with large-scale rationalisation and reorganisation which necessitated significant reductions in the workforce. In the first two sections the results of the inquiries are first presented in the form of individual case studies, then the national implications and historical background are discussed. The third section compares the British and German methods of reducing the labour force.

The authors have a clear and readable style and do not dress their facts and analyses in jargon or indulge in theoretical arguments. Thus the book is easily understood by the interested layman.

The approach to industrial change in Britain and West Germany: a comparative study of workplace industrial relations and manpower policies in British and West German enterprises, by Eric Jacobs and others. Anglo-German Foundation, St Stephen's House, Victoria Embankment, London SW1A 2LA. 1979. xix, 136 pages. £10.00 (ISBN 0 905 49206 4).

Zdravstvuitye tovarishch turist! *

'Russian for tourists', originally published in Moscow and subsequently adapted for the English-speaking reader, is colourfully illustrated and produced in a handy format.

The compilers explain that this book is intended to provide not a course in Russian but merely enough active and passive knowledge to enable the visitor to meet his everyday needs when in the USSR. A clear distinction is everywhere drawn between material of which the reader should have an active command, and words and phrases he should recognise, but ought not to have to utter himself.

All the information is given in the context of situations in which a visitor may expect to find himself. Explanations are given (in English) as to the exact circumstances under which this or that phrase should be used, to the extent that one is effectively guided through situations in advance. Advice is given on how to prevent the conversation from becoming too complicated to follow. This principle of explanation and guidance overflows from the purely linguistic aspect, so that the book almost amounts to a basic treatise on how a visitor to the USSR should behave.

Spoken phrases are given in imitated pronunciation using Latin characters, then in their Russian spelling, and finally in English translation. The danger here is that the reader might be tempted not to look at the Russian, and so fail to become used to its appearance. Of course nothing can remove the need initially for Russian phrases to be heard correctly spoken, if good pronunciation is to be acquired.

Certainly for its usefulness and excellent value this small booklet should make a useful inclusion in any visitor's luggage.

Russian for tourists: a textbook for the busy businessman and the lazy tourist, by V. G. Kostomarov and A. A. Leontyev. Russian Language Publishers. Available from Collet's, Dennington Estate, London Road, Wellingborough, Northants NN8 2QT. 1979. 198 pages. £1.25.

* Rough translation: 'Hello, comrade tourist!

Technology news

DoI order ship-handling simulator

Better land-based training of ships' officers, in the interests of safety at sea, will be provided by an advanced ship-handling simulator ordered from Marconi Radar Systems Ltd by the Department of Industry. The order, valued at nearly £1 million, is sponsored by the department's ship and marine technology requirements board.

Marconi Radar has been appointed prime contractor for the supply, installation and commissioning of the simulator by the summer of 1981. It will employ the company's computer-generated imagery system, Tepigen, allied to a Decca ship simulator bridge, to provide an all-weather, day and night training system. The simulator will be sited at a UK maritime college.

Around 80 per cent of accidents at sea have been found to be due to human error where the underlying factor is a lack of effective procedure. Government has been promoting the use of ship-handling simulators as an adjunct to the training of ships officers for the past 10 years.

In 1977 the first Department of Industry funded Decca ship simulator was installed at the College of Nautical Studies at Warsash, since when about 650 UK and overseas ships' officers have been through a course on the simulator. The Marconi installation is in addition to three Decca simulators ordered earlier for installation in 18 months at the Marine and Technical College, South Shields; the College of Nautical Studies, Glasgow; and as a second simulator for Warsash.

The bridge part of the Marconi simulator is a developed version of the Decca ship simulator in use at Warsash. The bridge contains all the normal 'on-board' instruments, radar and navigation displays and these will be integrated with ship's performance equations developed by the Department of Industry's National Maritime Institute. The addition of the Tepigen system provides a full mission capability trainer with the principal advantages of realism, extreme flexibility and simplicity of operation.

The Tepigen system, the 'all-weather' visual part of the trainer, uses life-like projected colour television pictures to simulate the actual visual conditions obtaining from the bridge throughout the course of an exercise. The television pictures are synthesised wholly from a computer without the use of cameras, models, video-tape or film. Scenery produced in this way can be manipulated freely and quickly to give a view which changes as the ship alters its heading and position.

The size, location, orientation, visibility and colour of objects in the scene are controlled by the computer in response to the details set up for that particular exercise, and are fully interactive with the ship's manoeuvres in response to helm and engine demands.

Moving objects such as other ships, from pilot vessels to very large crude-carriers, can be included in the 'playing' area and can be under the control of an instructor. Scene details can include buoyed channels, approaches to real ports, coastlines or open sea. Transition from daylight through dusk to darkness is realistic and navigation and flashing lights can be shown including general coastal and port lighting. Visibility can be varied from 'unlimited' to thick fog.

Megawatts from space are considered credible

Space power systems using photo-voltaic energy conversion emerges as a credible and economically competitive operation in the energy context of the future in a study carried out for the Department of Industry by General Technology Systems Ltd (GTS). This the first officially sponsored study to be carried out in the UK.

GTS was awarded, by the department last year, a contract to study the future industrialisation of space. Two industrial subjects were selected for closer examination: materials processing in the unique environment of space stations and space power systems; the latter comprising massive space stations to generate electrical power to be then transmitted to Earth.

Further preliminary surveys on two other subjects: large multi-purpose space telecommunications stations and Earth observation from space, were carried out with a view to establishing whether they warranted a similarly close examination.

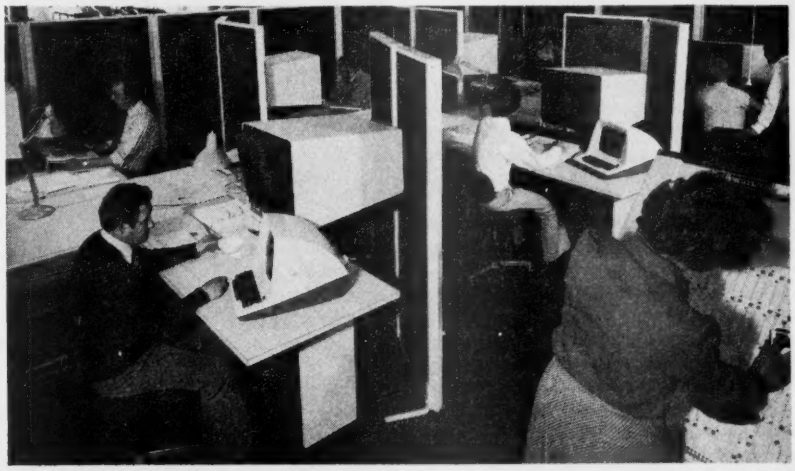
Critical study

The bulk of the study effort was devoted to space power systems and took the form of a critical study and assessment of proposals currently being studied by industry in the United States for government departments. This effort was shared between GTS and space department of the Royal Aircraft Establishment (RAE) working as part of its internal programme for the department. The Atomic Energy Research Establishment, Harwell, also made an expert contribution to the study.

The RAE effort concentrated on a critical analysis of systems technologies in their various manifestations of design, performance and adverse effects and on an investigation of the

BAe increases draughting productivity with CAD

The first engineering drawings are being produced with a new £350,000 computer aided design facility installed by the British Aerospace Dynamics Group at its Stevenage factory. By eliminating tedious detail drawing work, productivity will be increased by a factor of four and draughtsmen will be able to utilise their skills more effectively. Currently the Stevenage design office produces about 12 000 drawings a year. Controlled by a ComputerVision CPG 100 computer, the Stevenage facility has six interactive graphic stations, a digitiser, a Veratec 11 inch printer/plotter, a Calcomp 960 plotter and a ComputerVision photo-plotter.



requirements and characteristics of the massive and complex space transport on which every space power system will crucially depend.

The GTS effort in addition to co-ordinating the total task was directed towards the study of economic, legal, institutional, political, industrial and resources issues arising in the context of developing, constructing and operating space power systems.

The space power system using solar photovoltaic energy conversion emerged as an entirely credible engineering concept for providing base load electric power to Earth. In comparison with hydrocarbon or nuclear fuel burning systems of similar capacity its environmetal impact seems mild and it promises economically competitive operation in the energy context of the future, largely on account of free, unlimited and uninterrupted delivery of primary energy. The industrial market generated by an operational space power system project may well run into tens of thousand million pounds per year.

Clearly much further work remains to be done, in order to determine properly how the relevant capabilities of British industry could be involved in such projects, and the relevance of such power generating systems to the UK demand in the years to come.

Good progress was made with respect to the further investigations on space processing, and the preliminary assessments of future advanced space telecommunications and of remote sensing from space, referred to at the beginning, have indicated that while much thought has gone into the further development of techniques, too little is yet known about the probable combinations of time frames and extensions of applications which may be expected to take place over the next decade.

SRC plans scheme to update industry's graduates

Graduate recruits to industry and experienced people in industry needing to update themselves on relevant advances in science and engineering are expected to benefit from experimental schemes that have been agreed in principle by the Science Research Council. The schemes are the first results of the council's recently completed review of its policy towards the support of postgraduate education in universities and polytechnics through part-time and short courses.

At present the council's role in postgraduate education is limited to supporting students attending full-time courses of at least six months' duration. The review of its policy was prompted by its concern that the high rate of technological development meant that the scientific knowledge of many graduates in industry was out of date. The council had also received representations from employers and some academic institutions that the arrangement for public support of higher education discouraged the development of part-time and short courses to help graduates in employment to keep abreast of technological advances.

Surveys commissioned from Brunel and Essex universities and from the Institute of Manpower Studies covered samples of employers, course organisers and students. As a result of those surveys and of other consultations, the council has decided to test the situation by establishing some experimental

Queen's Award for Technological Achievement

Applications are invited from companies wishing to be considered for the Queen's Award for Technological Achievement. Application forms, which should be returned by 31 October, are available from the Secretary, The Queen's Awards Office, Williams National House, 11/13 Holborn Viaduct, London EC1A 1EL, tel. 01-222 2277.

Government Chemist finds falling levels of radioactivity . . .

Levels of radioactivity in water supplies due to nuclear installations in England and Wales are continuing to fall. In the river Thames, the amount is a minute fraction of the World Health Organisation's recommended maximum says the Government Chemist in his report for 1978 (HMSO, £4.25), published on 7 August.

The Department of Industry's Laboratory of the Government Chemist undertakes radiochemical analyses on behalf of the Department of Environment in order to assess the effect of nuclear installations in England and Wales on the environment. The levels of strontium-90 and caesium-137 found in a number of surface waters and in drinking water from selected supplies have, as expected, continued to fall. Comparison of samples taken from the river Thames at Oxford and London shows that although the discharge of low level radioactive effluent from the nuclear establishments in the Thames valley is detectable, the resulting activity is only a very small fraction of maximum levels recommended by the World Health Organisation.

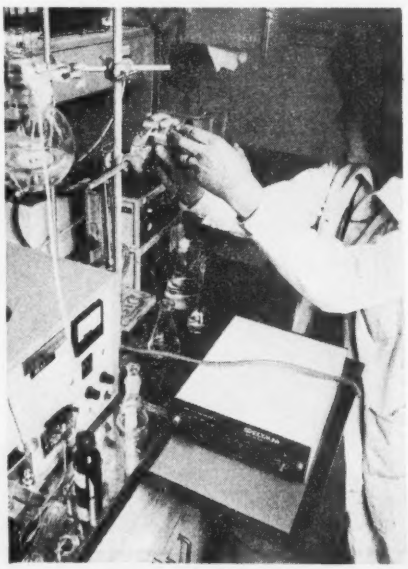
Analytical equipment also developed in the laboratory for the automatic determination of very low levels of arsenic and selenium has been used to examine more than 1000 samples of drinking water from a wide range of sources. No sample contained a higher level of arsenic than the limit recommended by the World Health Organisation. Selenium contents were also found to be significantly below both the WHO limit and that proposed by the European Economic Community.

The laboratory has, during the year, examined samples of liver and fat taken from the carcases of wild birds for the Institute of Terrestial Ecology in order to ascertain the extent to which persistent organochlorine pesticides might be implicated in their death. A special study was carried out for the Ministry of Agriculture, Fisheries and Food on wood pigeons shot in East Anglia during the spring sowing season. The levels of dieldrin found were markedly lower than those in a similar survey carried out in Scotland before clearance for the use of aldrin and dieldrin as cereal seed dressings was withdrawn in 1974.

In the introduction to the report, the Government Chemist highlights the practical contribution made by the laboratory in developing and adapting new methods of nutritional analysis of foods. This development work has continued and the report details the studies on high performance liquid chromatography as a means of determining riboflavin in foods.

As part of a wider investigation into clandestine trade in farm animal antibiotics the laboratory has, on behalf of the Ministry of Agriculture, Fisheries and Food, analysed 350 samples of these products.

High performance liquid chromatography used in the analysis of foods.



. . . and sponsors a symposium on fume cupboards

A symposium on laboratory fume cupboards, to be held in Falkirk on 31 October, is sponsored by the Laboratory of the Government Chemist and the Directorate of Scottish Services of the Property Services Agency. It is in response to requests from laboratory staff and building contractors in private industry.

The symposium will include all aspects of work on fume cupboards including their installation, performance, design, removal and disposal. It will also cover the problems of associated dust work and dispersion of the effluent into the atmosphere.

Speakers are being drawn from the Health and Safety Executive, Laboratory of the Government Chemist, Warren Spring Laboratory, Medical Research Council, Risley Nuclear Power Development Establishment and Hazardous Materials Service of the UK Atomic Energy Authority and the Universities of Leeds and Glasgow.

Further information is available from Miss J. R. McCall, PSA, Room 713, Directorate of Scottish Services, Argyle House, 3 Lady Lawson Street, Edinburgh EH3 9SD.

schemes and these are now being planned.

A scheme for those experienced in industry but needing to be updated on technological advances is likely to involve the Open University. As a forerunner to the scheme for new graduates, the council is going to support a limited number of bursaries at some polytechnics. The polytechnics' pilot scheme is intended to determine the benefits of bursaries to overcome any shortfall in meeting fees and expenses from other sources from part-time students.

Science directory for developing countries

A new source directory – 'British science and technology for developing countries' – has been published by the Overseas Development Administration. The aim of the book is to help plug the communications gap between potential overseas users and British suppliers of new scientific and technical know-how.

For use by developing country governments, administrators and planners, the directory lists 300 sources of British information and assistance. It includes government departments, government-funded institutions, learned societies, professional institutions, trade associations and trade research associations.

The agricultural sciences feature prominently and other entries cover building, shipbuilding, airways, telecommunications, engineering, planning, intermediate technology, management, marketing and textiles.

The booklet will be available to delegates of the United Nations conference on science and technology for development which will take place in Vienna from 20 to 31 August.

Inquiries: Publicity Dept. Room E920, ODA, Eland House, Stag Place, London SW1E 5DH, tel. 01-213 4943.

Harwell issues code for radiological protection

A code of practice for designers, installers and operators of radiological protection systems is published by the Atomic Energy Research Establishment, Harwell (HMSO, £2.50). It is contained in a report prepared under the auspices of the Advisory Committee on Radiological Protection Instrumentation which was set up in 1974 to review radiological protection systems.

The protection of personnel from radiological hazards is one of the most important requirements in nuclear energy work, and depends heavily on well-designed and reliable instrumentation. However, while there has been comprehensive documentation regarding nuclear reactor instruments, there has hitherto been no comprehensive guide for designers and installers of radiological protection equipment.

The advisory committee turned their attention to this problem and identified the main requirements of a suitable guide. The result is a code of practice intended to give a comprehensive coverage of the field and serve also as a reference guide on particular points.

Providing for the retraining of millions in industry

A microelectronics learning centre in every workplace in the country by 1981 is planned by the National Computer Centre and the Department of Industry, joint organisers of the microprocessor applications project (MAP) training scheme. Projects involving Open University training courses, and interactive viewdata tv systems will apply the advances in audio/visual communications brought about by the microprocessor to the retraining of millions of managers, technicians and operatives in industry.

Over 23 500 training places in 1980-81, at a cost of over £2 million, have been generated by MAP to-date.

The department and the NCC are working closely with the Open University to make available during 1980 an Open University course on microelectronics for managers. By the end of 1980, the Open University with Insac Ltd will have ready a do-it-yourself microelectronics training course using an interactive question and answer tv system.

A similar interactive system using viewdata tv is being developed by Computer Analysts and Programmers, part of the CAP-CPP group, in a project being undertaken for the Department of Industry. CAP has created software which enables a teacher to build or modify training material for any specific need or environment. Such material provides interactive questions and answers presented, together with animated graphics in colour, on a viewdata tv set.

Using CAP's system it is expected that, by 1981, Control Data Corporation will be in a position to provide a responsive microprocessor training facility for use in the office or workshop. It opens up the possibility of establishing a chain of learning centres up and down the country.

The department is exploring these means of mass education and training because, apart from the practising engineers provided with microelectronics training by MAP's conventional training courses, there are some three million operatives and technicians in the engineering industry. These will need retraining if companies are to be in a position to apply microelectronics to their production lines in the quantity necessary to raise the basic level of British competitivity.

The scale of the problem being tackled by MAP is indicated by the fact that in the UK some 80 per cent of the younger generation still leave school at 16 and 98 per cent reach their learning maximum at about 23 years of age. After this, for the majority, very little extra learning takes place. Knowledge bases decline, and people tend to reach positions of greatest responsibility when they are furthest from their formal educational experience.

Investigating the considerable need for retraining throughout industry, MAP with the NCC acting as consultants, arrived at the conclusion that the majority of people in industry needed training.

Training courses approved by MAP

By type of institution	Number of proposals	Amount of grant £
Universities	21	839 868
Polytechnics	14	321 992
Further education and higher education	22	279 375
Research associations	2	144 002
Private sector	20	509 442
	79	2 094 679
By Department of Industry region		
Northern	1	6 500
North west	11	209 775
Yorks and Humberside	10	229 701
East Midlands	8	116 049
West Midlands	3	72 311
South west	2	15 892
London and south east	19	564 051
Eastern	12	186 781
Scotland	4	53 027
Wales	3	21 638
Northern Ireland	1	2 350
National bodies	5	616 604
	79	2 094 679

Number of places generated by approved courses

1978-79	2 754
1979-80	18 063
1980-81	23 557

The managing director needs to know that a revolution is taking place and his competitors will be using new techniques to improve both their products and their production processes at his expense.

The production manager needs a minimum of electronic knowledge that can only be required from a variety of existing courses.

The instrumentation engineer needs to know the problems resulting from the digital/analog interface and he needs to understand software. The electronic engineer is probably out of date. The technician needs retraining to the limits imposed by his intellect and the requirements of his particular employment.

A survey of all existing electronics courses showed that there were insufficient of them to meet the probable demand and that the training base needed to be expanded rapidly. Beyond the current achievements of MAP there is much to be done, particularly in the area of basic education where every encouragement must be given to develop the skills inherent in the next generations. The demand for such skills will be high.

MAP information

The Department of Industry's microprocessor application project, to which £55 million has been allocated, is designed to encourage UK industry to apply microprocessor technology to a wide range of its products and processes.

Inquiries: MAP Information Centre, Department of Industry, LA Division, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 0839.

New products

Multi-voltage marine motor for instant use

A multi-voltage marine duty motor, designed to be instantly installed and wired to suit any standard three-phase 50 or 60 Hz supply in the world, from 190 V to 460 V, has been introduced by Newman Electric Motors Ltd, Bristol.

The motor was developed in collaboration with Newman customer Haigh Engineering Co, Ross-on-Wye, which produces sewage and garbage macerators and disposal units for the international marine industry. The motor was developed around Newman's established marine motor specification and has been approved by all the major shipping authorities, such as Lloyds in the UK and its equivalents in Germany, Norway, America, Italy and France. It is a four-pole machine rated at 2.2 kW (3 hp).

Further information: circle 573

Modular louvred luminaires for suspended ceilings

A 600 mm square by 250 mm deep modular luminaire, designed to integrate with standard suspended ceiling systems as a recessed unit, has been introduced by Silvertown Engineering. It has polished aluminium parabolic louvres and houses two 40 W 'U' shaped tubes. It can incorporate air-handling equipment.

The luminaires have bronze anodised bezel surrounds that serve as attractive trims and locating angles for both the louvres and abbutting ceiling panels. The units are secured by four adjustable brackets.

The body and gear tray are of zinc-coated

Modular luminaire for suspended ceilings.

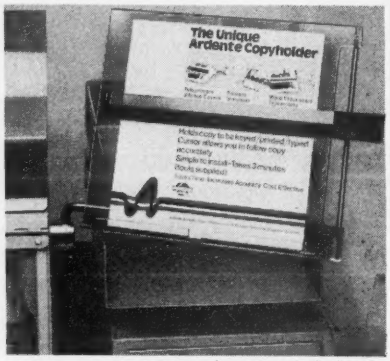
steel with an electrostatically applied white epoxy/polyester powder coating, stoved to a hard gloss, highly reflective finish that provides a consistent lighting performance.

Further information: circle 574

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Copyholder for message machines



Ardente has developed a copyholder to fit message machines such as teleprinters, typewriters, line printers and word processors. The unit is solidly constructed with a chromed metal frame and easy to fit. The copyholder plate tilts and pivots to give the maximum adjustability – particularly important when one machine is used by several operators.

Further information: circle 575

Electronic timers save space

The new 404 range of miniature electronic timers introduced by Londex features a two-wire connection system which is said to show 50 per cent saving on wiring costs over conventional models. The timers are fully solid state and enclosed in a slimline case only 17.5 mm wide for DIN rail or surface mounting.

The rangé includes a solid state adjustable delay timer type SVS which is connected in series with relays or contractors to delay energisation by up to 100 seconds. Only two models are required to cover the full voltage range from 24 to 240 V ac or dc. Repeat accuracy is plus or minus 1 per cent.

Where the input and output must be completely isolated, the matching EZS delay timer incorporates an output relay in the same slimline casing.

The KBS solid state flasher complements the delay timer, has the same series connection method and will switch directly a 100 W lamp at a frequency of 1 Hz. Being fully solid state, the unit has no moving mechanical parts to limit its life.

Further information: circle 576

Portable metal detector for industry

A portable metal detector for industrial use has been introduced by Goring Kerr Ltd. Portable metal detector P1 is expected to have applications in the packaging, food processing, pharmaceutical, textile, timber and building industries and wherever metal contaminants can be a serious problem.

The unit could be used in conjunction with a large area detector to pin-point specifically where a 'foreign body' lies once the main detector has identified its presence.

The unit's rechargeable nickel-cadmium batteries allow it to be used continuously for 18 hours without recharging. This makes it suitable for applications in the construction and timber industries.

The P1 produces an audible signal which indicates the type of metal present (ferrous metal generates a continous note and non-ferrous an interrupted note). An automatic balancing system eradicates many false or erroneous signals and simplifies use of the unit. The balancing system operates continuously from the moment the unit is switched on. Any error signal caused by slow temperature drift is automatically compensated. A manual push button for rapid re-balancing is also provided. The self-balance circuitry is designed so that under normal operating conditions it will not balance out a signal caused by a piece of metal unless the manual push button is used.

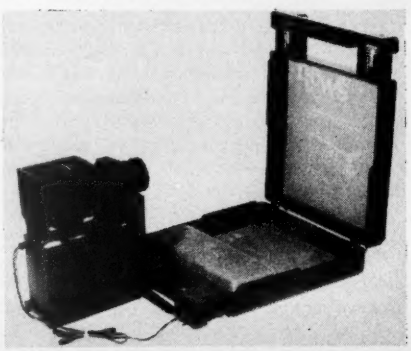
Further information: circle 577

Portable microfiche projector

Microform Communications International, Milton Keynes, has introduced a more advanced version of its Fichette portable microfiche projector. Model TCB has a rechargeable battery housed in the carrying case, which still measures only 8 in by 10 in by 2 in and contains the Fichette projector, mains connector, high gain screen and fiche library wallet.

The battery provides 40 minutes continuous operation. There is facility to recharge the battery from a car while motoring, or the battery may be recharged overnight by using the projector itself as a trickle charger. Safety devices ensure that the battery cannot be overcharged. Additionally a new link plate is included to locate and fix the projector in relation to the screen. This makes the unit easy to use on odd surfaces such as a sloping car seat.

Further information: circle 578



European community news

Commission puts up proposals on EEC-Asean pact

Proposals for a possible co-operation agreement between the community and the countries of the Association of South East Asian Nations (Asean) have been put to the council of ministers by the European commission.

It is hoped that this agreement, if adopted, will encourage European participation in the economic growth of one of the most rapidly developing areas of the world. Such an agreement would provide a framework for strengthening and diversifying trade and economic co-operation between the EEC and Asean. Detailed discussion of the commission's proposals by the members of the community will take place in Brussels over the coming months.

This activity follows a successful meeting between ministers of the EEC and Asean. The Association of South East Asian Nations was set up in 1967 by Indonesia, the Philippines, Singapore, Malaysia and Thailand to promote economic growth. The five countries have a population of 247 million, only slightly less than the community. Their economies are among the most rapidly growing in the world; between 1973 and 1978 the growth rate of gross domestic product in real terms varied between 6.8 per cent and 7.9 per cent compared to less than 3 per cent in the community. As a principal world supplier of rubber, abaca fibres, timber, palm oil and coconut and as a significant producer of oil, copper, sugar, coffee, tobacco, rice and tin, Asean represents an important and rapidly growing trading partner.

Discussions soon on 1980 GSP scheme

Discussions will soon start between the European commission and the member states about the generalised tariff preference scheme (GSP) for 1980, but it will be some time before the precise arrangements will be known.

It can probably be assumed that the goods and developing countries, covered by this year's scheme, will also benefit under next year's scheme. No assurance can yet be given, however, about the actual details of the arrangements: for example the preferential rates of duty applicable to processed agricultural goods, the size and precise coverage of the tariff quotas, the multifibre-based textile arrangements or about the addition of further beneficiary countries, like China, for certain goods. As soon as details are available in the *Official Journal*, a further notice will be issued and details will appear in due course in parts 10 and 11 of HM Customs Tariff.

Trade and Industry, 22–29 December 1978 page 627 described the GSP for 1979. Details of the items concerned under the 1979 arrangements were published in the *Official Journal*, L375, 30 December 1978 (obtainable from HMSO).

Any general inquiries concerning GSP arrangements for 1980 should be addressed to CRE1, Department of Trade, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5470/3102 or General Division, Department of Trade, 1 Victoria Street, London SW1H 0ET, tel. 01-215 3578/5491. Inquiries about what rates of duty will apply for imports outside the GSP arrangements and rules of origin should be made to general division.

Inquiries to Customs should be to International Customs (ICC 3) at HM Customs and Excise, Kings Beam House, Mark Lane, London EC3R 7HE, tel. 01-626 1515, ext. 2570/2750.

MCAs: off and on

Monetary compensatory amount (MCA) export levies and import refunds on Britain's trade with the rest of the community were re-introduced from Monday 13 August by the EEC joint management committee only one week after they had been dropped.

MCAs, which act as a levelling factor in trade between member countries and with non-member countries, were removed on Monday 6 August because sterling rose almost to the level of the 'green' pound. The MCAs were re-applied because sterling lost some of the gains made two weeks ago.

Cider makers to discuss harmonisation proposals with Customs

Members of the National Association of Cider Makers and the National Association of Perry Makers are to meet Customs and Excise next Tuesday (21 August) to discuss the European commission's proposal for the harmonisation of excise duty on alcoholic beverages.

West country cider makers are worried that if these proposals are accepted it would mean the higher-strength ciders (over 6 per cent alcohol by volume) being classed as table wines for harmonisation purposes.

The purpose of the meeting is to examine and discuss the commission's proposals as they affect cider to ensure that the views of the cider makers are fully considered in preparing for further detailed discussions to be held in September in readiness for a financial council meeting in October.

Solar Trade Association

The phone number of the Solar Trade Association (*Trade and Industry* 3 August page 255) should be 01-636 4717.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

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Dangerous substances to be banned 330

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Industrial change. Britain and West Germany 338

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Statistics
Big growth in unaccompanied ro-ro traffic 357
Registrations of British, community and foreign films 367

Living costs in Europe: CBI guide published

The eighth edition of the Confederation of British Industry's guide to 'Western European living costs' has been published.

The guide sets out general guidelines to likely costs in Austria, Belgium, Denmark, Finland, France, West Germany, Greece, Holland, Italy, Norway, Portugal, Spain, Sweden, Switzerland and the United Kingdom.

As in previous editions, the aim is to fill an information gap for those preparing to establish industrial or sales operations in the countries that are surveyed but is not intended to be a comparative study of one country's prices with another.

This guide, which includes sections on accommodation, clothing, consumer goods, food, salaries, office services, taxation and transport, can be obtained from Confederation of British Industry, 21 Tothill Street, London SW1H 9LP, price £12 (payment with order).

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other members states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions division, Export House, 50 Lud-

gate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 7174/482/408.

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*.

Tobacco. Regulations (EEC) 1579/79 amending, as regards the mechanism of market management, regulation (EEC) 727/70 on the common organisation of the market in raw tobacco (*Official Journal* L189, 27 July 1979).

Regulation (EEC) 1581/79 fixing the norm and intervention prices and the premiums granted to purchasers of leaf tobacco, and the derived intervention prices for baled tobacco for the 1979 harvest (*Official Journal* L189, 27 July 1979).

Seeds. Regulation (EEC) 1582/79 fixing the amounts of aid granted for seeds for the 1980/81 and 1981/82 marketing years (*Official Journal* L189, 27 July 1979).

Oils, fats and oilseeds. Regulation (EEC) 1583/79 fixing the guide price for linseed for the 1979/80 marketing year (*Official Journal* L189, 27 July 1979).

Regulation (EEC) 1584/79 fixing the amount of aid for cotton seed for the 1979/80 marketing year (*Official Journal* L189, 27 July 1979).

Regulation (EEC) 1608/79 fixing the guide price for castor seed for the 1979/80 marketing year (*Official Journal* L190, 28 July 1979).

Regulation (EEC) 1609/79 fixing the minimum price for castor seed for the 1979/80 marketing year (*Official Journal* L190, 28 July 1979).

Regulation (EEC) 1610/79 introducing supplementary aid for castor seed for the 1979/80, 1980/81 and 1981/82 marketing years (*Official Journal* L190, 28 July 1979).

Regulation (EEC) 1612/79 fixing the production target price, the production aid and the intervention price for olive oil for the 1979/80 marketing year (*Official Journal* L190, 28 July 1979).

Regulation (EEC) 1613/79 fixing the monthly increases in the representative market price, the intervention price and the threshold price for olive oil for the 1979/80 marketing year (*Official Journal* L190, 28 July 1979).

Soya beans. Regulation (EEC) 1611/79 fixing the guide price for soya beans for the 1979/80 marketing year (*Official Journal* L190, 28 July 1979).

Regulation (EEC) 1614/79 laying down special measures in respect of soya beans (*Official Journal* L190, 28 July 1979).

Cereals and rice. Regulation (EEC) 1594/79 fixing for the 1979/80 marketing year the threshold prices for cereals and for certain classes of flour, groats and meal (*Official Journal* L189, 27 July 1979).

Regulation (EEC) 1602/79 amending the annex to regulation (EEC) 2102/75 determining the quantity of potatoes required for the manufacture of one tonne of starch (*Official Journal* L189, 27 July 1979).

Regulation (EEC) 1603/79 laying down rules for the payment of a premium to producers of potato starch and repealing regulation (EEC) 1809/78 (*Official Journal* L189, 27 July 1979).

Fruit and vegetables. Regulation (EEC) 1599/79 derogating in respect of the 1979/80 marketing year from the common quality standards for brussels sprouts (*Official Journal* L189, 27 July 1979).

Regulation (EEC) 1600/79 derogating in respect of the 1979/80 marketing year from the quality standards for dessert apples and pears (*Official Journal* L189, 27 June 1979).

Regulation (EEC) 1639/79 amending the annex to regulation (EEC) 516/77 on the common organisation of the market in products processed from fruit and vegetables (*Official Journal* L192, 31 July 1979).

Regulation (EEC) 1640/79 limiting the granting of production aid for William pears preserved in syrup (*Official Journal* L192, 31 July 1979).

Regulation (EEC) 1686/79 establishing the standard average values for customs purposes of citrus fruits and apples and pears (*Official Journal* L192, 2 August 1979).

Wine. Regulation (EEC) 1615/79 fixing the guide prices for wine for the period 16 December 1979 to 15 December 1980 (*Official Journal* L190, 28 July 1979).

Regulation (EEC) 1709/79 amending regulation (EEC) 343/79 laying down general rules governing certain distillation operations in the wine sector (*Official Journal* L198, 4 August 1979).

Regulation (EEC) 1714/79 on the granting of re-storage aid for table wine for which a storage contract was concluded during the 1978/79 wine-growing year (*Official Journal* L198, 4 August 1979).

Regulation (EEC) 1715/79 laying down, for the wine-growing year 1979/80, detailed rules for the distillation of the by-products of wine-making (*Official Journal* L198, 4 August 1979).

Flax and hemp. Regulation (EEC) 1616/79 fixing the amounts of aid for fibre flax and hemp for the 1979/80 marketing year (*Official Journal* L190, 28 July 1979).

Eggs and poultrymeat. Regulation (EEC) 1627/79 amending the annex to regulation (EEC) 572/73 setting out the egg and poultrymeat products eligible for the advance fixing of export refunds (*Official Journal* L190, 28 July 1979).

Sugar. Regulation (EEC) 1630/79 laying down detailed rules for the application of quotas for the production of isoglucose during the period 1 July 1979 to 30 June 1980 and amending regulation (EEC) 1470/77 (*Official Journal* L190, 28 July 1979).

Milk and milk products. Regulation (EEC) 1637/79 amending regulation (EEC) 1080/77 on the supply of milk and certain milk products at reduced prices to schoolchildren

'With effect from 1 September 1979 (EEC) 1080/77 is hereby amended as follows:

1 in article 1 (2) the amount "13 units of account per 100 kilograms" shall be replaced by "21.40 Ecu per 100 kilograms".

2 in article 2 (5) the expression "33%" shall be replaced by "25%".'

(*Official Journal* L192, 31 July 1979).

Regulation (EEC) 1638/79 amending regulation (EEC) 1763/78 on the transfer to the Italian intervention agency of skimmed-milk powder. In article 1 (2) of regulation (EEC) 1763/78 '1 January 1980' is hereby replaced by '1 November 1980'.

(*Official Journal* L192, 31 July 1979).

Pigs and pigmeat. Regulation (EEC) 1641/79 fixing the basic price and the standard quality for slaughtered pigs for the period 1 November 1979 to 31 October 1980 (*Official Journal* L192, 31 July 1979).

Processed fruit and vegetables. Regulation (EEC) 1710/79 fixing, for the 1979/80 marketing year, the production aid for tinned pineapple and the minimum price to be paid to pineapple producers (*Official Journal* L198, 4 August 1979).

Customs regulation

Rules of origin. The *Official Journal of the European Communities* L190, 28 July 1979, contains the text of regulation (EEC) 1628/79 repealing regulation (EEC) 2067/77 concerning the determination of the origin of slide fasteners.

Further information: Department of Trade, General Division, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5750. Copies of the *Official Journal* may be obtained from HMSO, price £1.20 plus postage.

New warning sign for laser beams

A new directive 79/640 has been adopted by the European commission, which adds a warning sign for laser beams to the original directive 77/576 concerning EEC standards governing notices on work premises. The new standards in both directives will be introduced into United Kingdom legislation by 1 January 1981 and examples of safety signs and their meaning may be seen in a consultative document issued by the Health and Safety Commission, published in May 1979, available from HMSO price 50p net (ISBN 0 11 883249 2). Recommendations governing the signs and the distance from which they must be legible are also given in the later directive.

EEC information

The EEC Information Unit helps firms of all types and sizes by answering general questions about EEC membership.
The unit's address is:
EEC Information Unit,
Department of Industry,
Eleventh floor, Millbank Tower,
Millbank, London SW1P 4QU.
Tel. 01-211 7060.

Wear a European hat

A T&I guide to the European community was published as separate supplements in the 24 November, 1 and 8 December 1978 issues of *Trade and Industry*. Compiled by the Department of Industry's EEC information unit the supplements succeed the 'EEC: your questions answered' booklet, last published in 1976, and contained the following:

EEC 1: how the community works. Full details of EEC structure, law, budgets.

EEC 2: know your markets. Exports, imports, government services, customs documentation, working and travelling in the EEC.

EEC 3: keeping in touch. Grants and loans, company law and competition policy, including *Trade and Industry*'s quarterly article 100 checklist of draft and adopted directives and the European public holiday guide 1979.

Copies of the supplements are available at 40p each or £1.00 for the set of three, including postage.

Send a cheque or postal order to Trade and Industry, Eleventh floor, Millbank Tower, Millbank, London SW1P 4QU.

Overseas trade news

Wipo calls meeting to discuss patent co-operation treaty

A meeting of 'users' of the patent co-operation treaty is being convened by the Director-General of the World Intellectual Property Organisation (Wipo) at Wipo headquarters in Geneva on 5 October.

The purpose of the meeting is to provide an indication of the most common kinds of problems encountered or uncertainties felt in the filing and processing of international applications; to foster an awareness of the most common kinds of mistakes made in international applications and in their processing; and to suggest possible improvements and simplifications which might be introduced into the PCT procedure (except changes of a kind which would require the amendment of the articles of the treaty itself).

The discussion which will be centred on the international application of PCT; the drafting of the description, claims and abstract of the international application and amendments; representation; official fees; costs; time limits; international search; international preliminary examination; PCT publications; and entering the national phase.

Following the introduction of each topic an opportunity will be given for delegates to take part in discussion.

Invitations to participate in the meeting are being sent to the international non-governmental organisations which have the status of observer at the sessions of the assembly of the international patent co-operation union (PCT union) and – through their competent national authorities – to interested national organisations (including their individual members) in the contracting states of the PCT.

Interested national organisations are those whose members have an interest in the filing of international applications under the PCT or in the dissemination of the technical information contained in such applications.

All interested members of the public in the contracting states who do not receive an invitation through any of these organisations and would like to take part should get in touch with Wipo, 34 Chemin des Colombettes, 1211 Geneva, Switzerland, tel. 022 999111, telex 22376, by 15 September.

Export courses start in September

More than 35 colleges and polytechnics will, starting in September, be running the one-year foundation course in overseas trade sponsored by the British Overseas Trade Board and four professional institutes involved in education for overseas trade.

Over 3000 students have enrolled on the course since it began in 1975. The four professional institutes are those of export, marketing and freight forwarders and shipping executives.

The syllabus covers four main subjects: international trade and payments; cargo insurance; transportation and documentation; and elements of export law. Although the course has been designed as a complete package it is possible to study any one of the subjects separately. The course, designed both for those with management potential and for practising export executives, is offered by colleges on a one year part-time basis.

On completion, successful students in England, Wales and Northern Ireland are awarded a certificate by the Business Education Council, and in Scotland from the Scottish

Revised certificates for TIR carnets issued

Since last Wednesday revised certificates of approval for vehicles used under a TIR carnet, form GV60, have been issued.

The only requirement that operators should note is the maximum and minimum sizes of the usual two photographs of the vehicle. These must fit within the box which measures 185 mm × 135 mm (7¼ in × 5⅜ in) on page one of the certificate. The smallest size of photograph acceptable is 75 mm × 50 mm (about 3 in × 2 in).

These measurements refer only to the photograph of the vehicle and not the usual white border of the print or extraneous details. Where three photographs are required these must be of the minimum size.

Either black and white or colour photographs are acceptable, photographs mounted on their sides can also be used. Plastic wallets will be provided for the new certificate. Old certificates will be valid until their expiry date.

The required sizes of the photographs now correspond to those provided by most cameras of the instant developer type.

The certificate has been doubled in size from A4 to A3 folded. This format has been dictated by the terms of the latest TIR convention. Before issue the new certificate will be laminated on pages 1 and 2 (one half of the folded form).

The TIR convention (Transport International Routier) to which the United Kingdom is a party, simplifies customs requirements by permitting vehicles, whose goods carrying compartments have been sealed in the country of origin, to cross frontiers without customs inspection.

Before a vehicle is used under a TIR carnet, it must have a certificate of approval as proof that it complies with the requirements of the TIR convention.

No change has been made in the procedure for applying for TIR approval, which is done through traffic area offices.

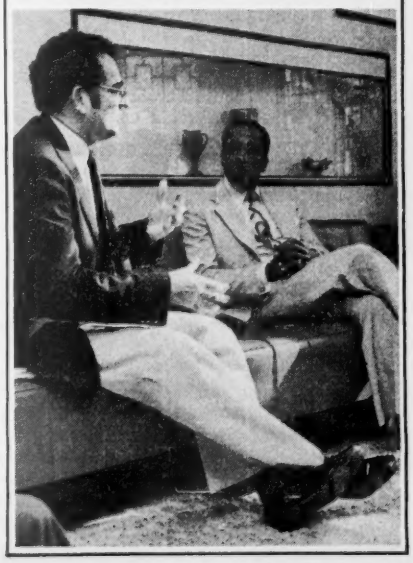
Westminster world-wide

In the first half of 1980, the City of Westminster Chamber of Commerce is arranging four trade missions. The first, in January, is to Ivory Coast and Senegal and will be of particular interest to the members of the chamber's newly formed Anglo-Afrique Group. On 17 to 23 February, a mission to Mexico will give an opportunity for members to visit the southern United States. The April mission is to Japan and Hong Kong, and on 2 to 14 June, Thailand and Malaysia will be visited.

Details about future trade missions can be obtained from Denzil Taylor, City of Westminster Chamber of Commerce, Mitre House, 177 Regent Street, London W1R 8DJ, tel. 01-734 2851, ext. 34.

Technex briefs Cameroon ambassador

Paul Cautley (left) of Technex briefs Cameroon's ambassador to Britain, Paul Pondi, on the company's programme in west Africa. Mr Pondi had asked Technex for this personal briefing after seeing reports of the launch of the company. (*Trade and Industry*, 29 June, page 576).

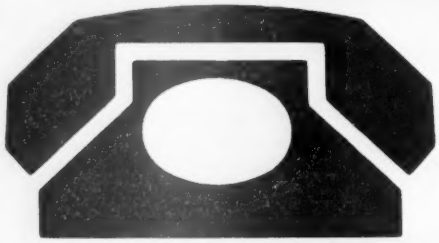


OTAR: help for exporters

Overseas Tariffs and Regulations Section (OTAR), Export Services and Promotions Division, Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757) can give you directly, or through your regional office, up-to-date information on the tariffs and customs regulations of overseas countries, import licensing regulations and restrictions including import quotas; certificate of origin; consular invoices and fees; labelling and marking requirements; regulations on foodstuffs, drugs and pharmaceuticals, agency legislation; setting up of a subsidiary company; and the import of samples. It also provides information, in collaboration with the Ministry of Agriculture, Fisheries and Food, on health regulations for livestocks meat, animal products and plants and seeds. In short, OTAR can help on almost all legislation which affects the entry of British goods into overseas countries.

Inquiries which concern the countries of more than one sub-section (excluding inquiries involving only EEC countries) should be made to OTAR's co-ordination sub-section on 01-248 5757 extension 452 or 454.

For information on specific countries, phone the number and extension given below



01-248 5757

extension

Sub-section A

1 Co-ordination of EEC regulations, requirements and common customs tariff (CCT), Denmark, France incl. overseas territories, Greece, Turkey, Cyprus

408 Denmark (incl. Faroe Islands and Greenland). EEC legislation on tariff and non-tariff barriers relative to community trade

423 France and French overseas departments, French overseas territories, Comoros

439 Greece (incl. Dodecanese Islands), Turkey, Cyprus

2 Benelux, Dutch overseas territories, Irish Republic, Italy, Federal Republic of Germany

288 Belgium, Luxembourg, Netherlands, Netherlands Antilles, Aruba, Bonaire, Curacao, St Eustatius, St Martin (Dutch), Saba, Suriname

466 Italy, Irish Republic

467 Federal Republic of Germany

Sub-section B

Efta countries, Spain, Gibraltar, Malta, Israel, Macao

458 Israel, Norway, Gibraltar, Malta

459 Austria, Sweden, Switzerland

460 Portugal, Finland, Iceland, Macao

461 Spain, Canary Islands, Andorra

Sub-section C

1 North America, Bahamas, Bermuda, West Indies

455 Canada

456 USA (incl. Alaska, Caroline Islands, Guam, Hawaii, Mariana Islands, Marshall Islands, Panama Canal Zone, Puerto Rico, Samoa (US), Virgin Islands (US), Wake Island)

7312 Anguilla, Antigua, Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St Kitts/Nevis, St Lucia, St Vincent, Trinidad and Tobago, Turks and Caicos Islands

2 South and central America

474 Argentina, British Antarctic Territories and Antarctica, Cuba, Dominican Republic, Falkland Islands, Haiti, Paraguay, Uruguay, Bolivia, Chile, Colombia, Ecuador, Peru, Venezuela

476 Brazil, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama

Sub-section D

Africa

462 Algeria, Ceuta and Melilla, Egypt, Equatorial Guinea, Libya, Morocco, Sudan, Tunisia, Western Sahara

471 Angola, Cape Verde, Guinea-Bissau, Jibuti (Djibouti), Malawi, Mauritius, Mozambique, Rwanda, St Helena and Tristan da Cunha and Ascension Islands, Sao Tome/Principe, Seychelles, Somalia, South Africa (with Botswana, Lesotho, SW Africa, Namibia and Swaziland), Zambia, British Indian Ocean Territory

472 Benin, Burundi, Cameroon, Central African Empire, Chad, Congo (Brazzaville), Ethiopia, Gabon, Ghana, Guinea, Ivory Coast, Kenya, Madagascar, Mali, Mauritania, Niger, Senegal, Tanzania, Togo, Uganda, Upper Volta, Zaire

473 The Gambia, Liberia, Nigeria, Rhodesia, Sierra Leone

Sub-section E

Australasia and south-east Asia, eastern bloc, China, Mongolia, Yugoslavia

401 New Zealand, Singapore, Thailand, W. Samoa, Chatham Islands, Cook Islands, Niue Islands, Tokelau Islands, Philippines

468 Australia, Solomon Islands, Cocos (Keeling) Islands, Christmas Island (Indian Ocean), Nauru, New Hebrides, Papua New Guinea, Albania, Bulgaria, Czechoslovakia, German Democratic Republic, Hungary, Poland, Romania, USSR, China, Mongolia, Yugoslavia

469 Brunei, Fiji, Hong Kong, Indonesia, Malaysia, Tonga, Gilbert Islands (incl. Ocean Island, Phoenix and Northern Line Islands), Tuvalu, Norfolk Island, Pitcairn Island

Sub-section F

Middle East (part) and Asia (part)

420 Afghanistan, Burma, India, Pakistan, Japan, Korea Democratic Peoples Republic, Korea Republic of, Taiwan, Yemen Arab Republic, Yemen Peoples Democratic Republic

475 Iraq, Kampuchea (formerly Cambodia), Kuwait, Laos, Lebanon, Vietnam Socialist Republic of, Bahrain, Iran, Oman, Qatar, Syria, United Arab Emirates

7062 Bangladesh, Jordan, Maldives, Nepal, Saudi Arabia, Sri Lanka

Queen's Award for Export Achievement

Applications are invited from companies wishing to be considered for the Queen's Award for Export Achievement. Application forms, which should be returned by 31 October, are available from the Secretary, The Queen's Awards Office, Williams National House, 11/13 Holborn Viaduct, London EC1A 1EL, tel. 01-222 2277.

Business Education Council. Successful completion of the course is accepted as an alternative to the earlier parts of the examination requirements of the sponsoring institutes.

Copies of a leaflet describing the course syllabus and teaching arrangements in greater detail and copies of the list of colleges and polytechnics are available free from Mr Godfree, Room 220, ED3A, Department of Trade, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5469.

ECGD backs first Gambian buyer-credit loan

An Export Credits Guarantee Department-backed loan for $7.8 million notches up two firsts. It is the first ECGD-backed buyer-credit loan to The Gambia and it is also the first to be guaranteed by the Gambian government.

The loan has been made available by Standard Chartered Merchant Bank, acting on its own behalf and for Standard Chartered Bank Ltd, to Atlantic Hotel Ltd of The Gambia.

The loan will help finance a contract awarded to Balfour Beatty Construction for the supply of goods and services to extend and modernise the Atlantic Hotel in Banjul.

EGAC appointment

Donald F. Rees, chairman of William F. Rees, has been appointed by Trade Secretary John Nott to the Export Guarantees advisory council. The council advises the Export Credits Guarantee Department on its commercial operations.

Efta exports: amendment available

Details of higher value limits which have applied since 1 January this year to certain consignments exported to Efta countries are now available in an amendment to customs notice 827. They concern consignments of originating goods using form EUR2 and private exportations of small value intended for personal or family use, and the increases apply to exports to Efta countries only (see *Trade and Industry*, 12 January 1979, page 67).

Amendment no 1 to customs notice 827 may be obtained on request at any local office of Customs and Excise.

Financial aspects of working abroad: London conference planned

A conference on the financial implications of working abroad is being organised by the middle east and north African section of the London Chamber of Commerce and Industry. To be held on 24 October the conference will discuss the UK personal tax, exchange control, investment and other problems faced by working expatriates and examine methods by which employers of expatriate staff may best advise their employees located abroad.

The following speakers will take part: Harry Brown, managing director, Expatriate Financial Advisors Ltd who will deal with the 1977 Finance Act and the implications of the rent act for letting your UK home; Peter Smith, director Sedgwick Forbes Personal Finance Management Ltd who will speak on the tax position of non-residents and exchange control; and Jack Walder, director, Walder-Ramsay Consultants Ltd who will deal with social security and pensions.

The conference will be chaired by Harry Brown and there will be an opportunity for panel discussion.

For further information and an application form please contact Jennifer Blay, London Chamber of Commerce and Industry, 69 Cannon Street, London EC4N 5AB, tel. 01-248 4444 ext. 34.

Social security agreement with Portugal ratified

British retirement and widow pensioners living in Portugal will for the first time get an increase in their pensions this November, at the same time as the benefits go up in this country. This is because the reciprocal social security agreement between Britain and Portugal, signed in London last November, has now been ratified by both governments and is due to come into force on 1 October.

The agreement benefits pensioners living in Portugal and assists people who move from one country to work or live in the other. It covers benefits provided under the national insurance and industrial injuries schemes in the UK and the corresponding schemes in Portugal. A protocol to the agreement enables medical treatment to be obtained through the state services of both countries.

Retirement and widow pensioners living in Portugal will receive the pension increase in November and all future increases, but they will not get any earlier increases.

Qantas chooses Rolls-Royce engines

Rolls-Royce RB211 engines have been chosen by Qantas, Australia's international airline, to power its two new long-range Boeing 747B airliners. Since the present Qantas fleet of 17 Boeing 747s is powered by United States' engines, the order represents a significant breakthrough for Rolls-Royce.

Detailed evaluation

The order followed a detailed evaluation of all jet engine developments for Boeing 747 aircraft. The study extended over several months and involved assessment by engineering and financial experts of cost and performance data for the engines and discussions with overseas airlines that operate the various engine types available.

Sir Kenneth Keith, Rolls-Royce chairman, said that Qantas was the fourth new airline to order RB211 engines, the first being the United States flag carrier Pan American World Airways.

Aerospace exports up £45m on 1978

With a total of nearly £100 million for March, Britain's aerospace exports rose in the first quarter of this year by over £45 million on the same period last year, reports the Society of British Aerospace Companies.

March 1979 exports of £99,017,000, the latest month for which figures are available after delays in publication of official statistics, were nearly £14 million up on that month in 1978 with overseas deliveries of aircraft and parts and aero-engines and parts each contributing over £43,600,000 of the overall total.

Britain's overseas trade in aeronautical instruments is booming with exports of this sector worth nearly £20 million in the first three months of the year, up by well over £5 million on the first quarter of 1978.

It has been a strong start to the year, too, for the flight simulator industry whose exports, with associated equipment, totalled £5.4 million, a rise of £4.8 million. Over £6 million of guided weapons were exported in the quarter.

'Hints to Exporters' booklets published

Revised editions of the 'Hints to Exporters' booklets on Gibraltar, Hungary and Sri Lanka have been published.

British exporters can order these booklets by post, accompanied by the appropriate remittance, from the Department of Trade, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU, at £1 per copy, plus postage and packing as follows: 1 copy 20p; 2 to 4 copies 30p; 5 to 7 copies 40p; more than seven post free.

Copies may also be purchased by personal callers at Export House and at the offices of the Department of Industry at Newcastle upon Tyne, Cockermouth, Manchester, Leeds, Nottingham, Birmingham, Bristol; from the Scottish and Welsh Offices and from the Department of Commerce, Belfast.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH.

1750: China: revised arrangements for 1979

Revised 1979 quota arrangements for imports into the community from China will shortly be published in the *Official Journal of the European Communities*.

Meanwhile the intended changes affecting imports into the UK from China under quotas numbered R1, R2, R3, R4, R7 and R8 and mfa categories 1 to 12, 14B, 17 to 20, 32, 37, 39 and 89 are provisionally set out in the tables (for full descriptions of mfa categories see notice to importers 1691, *Trade and Industry*, 28 July 1978). If, following community legislation to implement these revised arrangements, there is any change in the provisions outlined here a further notice to importers will be issued.

Licensing arrangements

The revised quota levels announced in this notice will be allocated by the Import Licensing Branch. Import licences already issued against existing levels will be counted against the new quota limits set out in the tables.

Traders seeking an allocation from the revised quotas listed in the tables should apply to the Import Licensing Branch, at the address shown above, not later than 7 September 1979 on form ILB/A, indicating on page 2 the amount applied for in the units in which the quota is expressed (boxes 2, 3 and 4 on that page need not be completed); on page 3 and copy, the applicant's name and address, description of goods, 8-figure tariff/trade code number and countries of consignment and origin should be entered. The appropriate R quota number or mfa category should also be entered in the box headed 'Description of goods.'

Applicants seeking an allocation from quota under mfa category 12 are not required to submit past trade returns. For other quotas, statements of past trade are not required from traders who applied earlier this year under the provisions of notices to importers 1718, 1719 or 1720 (*Trade and Industry*, 5 January 1979) for a licence to import goods from China in the R quota or mfa category for which they now submit an application; in these cases previously submitted past trade returns will be used as a basis for allocations.

Applications from all other traders should be accompanied by a statement of past trade by the applicant, in respect of each such R quota or mfa category applied for and in the units in which the quota is expressed, for each of the years 1976, 1977 and 1978, supported by a report by a qualified, practising, independent accountant. A pro forma for this purpose is available from Import Licensing Branch and applications will only be dealt with on receipt of correctly completed forms. Applications arriving later than 7 September 1979 will not be considered.

No guarantee can be given that demands can be met and traders are warned not to commit themselves irrevocably until they receive an import licence. Licences will be issued as soon as possible after the closing date, subject to the necessary community legislation having been enacted. Import licences issued under the provisions of this notice will be valid until 31 March 1980 for goods *shipped to the UK on or before 31 December 1979*; they will not be further extended.

Quota no./CCT heading no./Description	Value £1,000 cif or quantity
R1/36.06	
Matches (excluding Bengal matches)	21 250 short standards
R2/ex 42.03	
Leather gloves, including gloves of leather and furskin or of leather and artificial fur and including gloves of fabric and leather	21 000 pairs
ex 60.02	
Gloves knitted or crocheted to shape, not elastic or rubberised of flax	
ex 61.10	
Gloves of woven flax	
R3/50.04, ex 50.07	
Thrown silk yarns	2 tonnes
R4/ex 50.09	
Woven fabrics of silk of a weight exceeding 585 g/10 m² in the gum, or exceeding 485 g/10 m² not in the gum	50 tonnes
R7/65.05, 65.06	
Headgear, not being wholly or partly of wool or fur felt	876.818
R8'/69.11, 69.12	
Domestic china and earthenware	650

' Amended coverage excluding CCT heading 69.13.

Category no.	Units	Quota
1	tonnes	60
2	tonnes	3 800 ²
	Of which, not more than	
2 (IL)	tonnes	380
3	tonnes	40
	Of which, not more than	
3 (IL)	tonnes	4
4	pieces	465 000
5	pieces	1 030 000
	Of which, not more than	
5 (IL) ³	pieces	9 000
6	pieces	188 000
7	pieces	152 000
8	pieces	745 000
9	tonnes	300
10 + 11	pairs	620 000
	Of which, not more than	
10 (IL)	pairs	20 000
12	pairs	461 000
14 B	pieces	14 000
17	pieces	35 700
18	tonnes	70
19 + 89	pieces	4 000 000
20 + 39	tonnes	150
32	tonnes	270
37	tonnes	499
	Of which, not more than	
37 (IL)	tonnes	150

² Including 1000 tonnes allocated for cloth used in the manufacture in the UK of fusible interlinings – see notice to importers 1720, *Trade and Industry*, 5 January 1979. ³ Of wool and of fine animal hair. IL = Inner Limit.

Existing restrictions

Pending community legislation, existing restrictions on trade with China in goods not covered by this notice will continue. It is, however, expected that when that legislation is enacted some goods currently restricted when imported from China will be placed on a surveillance licensing basis, although should surveillance licence issues approach pre-set limits established in the appropriate community legislation (shortly to be published in the *Official Journal of the European Communities*), formal restrictions at those levels may be re-imposed without warning. In preparation for the change to 'double control' surveillance licensing foreshadowed in notice to importers 1751, surveillance licences issued from 1 October 1979 under these arrangements will be endorsed 'valid only for goods shipped on or before 31 December 1979'. Information as to the goods concerned will be published in a further notice when details are available.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext 280.

1751: China: arrangements for 1980

The EEC commission has negotiated an mfa-type agreement with China on trade in textiles for the calendar years 1979 to 1983 inclusive. The agreement, which provides for China to restrain at agreed levels exports to the community of certain textile products intended for domestic consumption, will apply from 1 January 1979 and arrangements for allocations under the 1979 quota levels are set out in notice to importers 1750.

The agreement covers only textile products within mfa categories 1 to 114 (for full descriptions see notice to importers 1691, *Trade and Industry*, 28 July 1978). Traders will wish to note that the new agreement provides for the Chinese authorities to export administer quotas for certain of these categories from 1 January 1980. Existing licensing arrangements for textile products not covered by mfa categories 1 to 114 are not affected by the agreement.

Goods in mfa categories 1 to 114 to which quota restrictions do not apply in 1980 will be subject to surveillance licensing on a 'double control' basis, that is to say that for such goods shipped on or after 1 January 1980 surveillance licences will be issued only against applications supported by a valid export certificate issued by the Chinese authorities.

Full details of the 1980 quotas and licensing arrangements will be published as soon as possible.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext 280.

1752: revised 1979 arrangements for certain textile imports from Czechoslovakia and the GDR

Notice to importers 1718 (*Trade and Industry*, 5 January) set out the 1979 quota arrangements for imports from the state trading area, including Czechoslovakia and the German Democratic Republic. NTI 1745 notified traders of revisions to certain quotas and following clearance through the appropriate European community machinery further quotas have been revised and are now as set out below:

Imports from Czechoslovakia

Category no.	Units	Quota
10 + 11	Pairs	8 000
67	Tonnes	220
118 + 119 + 120	Tonnes	67
	Of which, not more than	
118 + 119 + 120 (IL) '	Tonnes	43

' Of towels of all descriptions.

Imports from German Democratic Republic

Category no.	Units	Quota
3	Tonnes	18
	Of which, not more than	
3 (IL) ²	Tonnes	13
37	Tonnes	76
67	Tonnes	34

² Other than unbleached or bleached.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 280.

Overseas trade exhibitions

UK consolidates in Australian engineering market

From Jim Crain, British consulate-general, Melbourne

Britain's national pavilion was the largest of the 10 nations who sponsored stands at this year's Australian international engineering show.

Held this year from 23 to 27 July in Melbourne the event attracted 23 000 visitors – a record for the show.

Fourteen British companies and 13 Australian-based companies acting on behalf of their British principals occupied the British pavilion, sponsored by the British Overseas Trade Board.

ASR Servotron, exhibiting for the first time in Australia, firmly established its position in this market by securing an order for £10,000 worth of servodrives and servomotors from the only Australian manufacturer of numerically-controlled machine tools. Eric Kohn ASR's chairman said that as a result of the show he expected his companies sales to Australia to increase to £100,000.

Engis exhibited its range of lapping and polishing machines and diamond pastes. This company, taking part in the exhibition for the fourth time, claimed that this year's show was the best ever and expected to secure orders worth £50,000.

Good sales and further orders

The machine tool industry was well represented by A. A. Jones and Shipman, Adcock-Shipley, the 600 Machinery Group, Wickman and Boxford and all reported good sales and expect further substantial orders.

Coventry Climax which has just taken over the management of its Australian distributor attracted great interest in its range of forklift trucks and expects to consolidate its position on the Australian market because of the inquiries it received.

The Keetona Hydroform automatic folding machine which was shown by its local agent A. J. Wilcock Scientific and Engineering PTY was well received particularly by interstate visitors and the agent is confident that sales will result.

All the exhibitors agreed that the British pavilion provided a first-class shop window for British engineering products. This view was further endorsed by the 18 exhibitors who have already indicated their intention of showing at next year's show to be held in Sydney from 15 to 20 September 1980.

Mr D. Richardson (left) of Engis Ltd discusses his company's products at this year's Australian engineering exhibition.

Leipzig Fair
2/9 September 1979

German Democratic Republic

30 DDR

300,000 Visitors from 100 Countries
come every year to the Leipzig Autumn Fair. They come because it offers information, contacts, trade; a comprehensive view of GDR products for export, plus an ever-growing range of goods from other socialist countries resulting from socialist economic integration; new products from 6,000 manufacturers in 50 countries; a programme of conferences and lectures linked with the exhibits; and a back-up service designed to ensure that every visitor gets the best possible results from his stay.

1949/1979 30th Anniversary of the GDR

Reserved accommodation bookable in the UK. Direct flights by British Airways. Inclusive arrangements and Rent-a-Car facilities. Further information from Leipzig Fair Agency, Dept. TI, 20 Conduit Street, London W1R 9TD. Tel 01-493 3111.

Overseas trade export services

Pony Express gallops to same day New York service

Pony Express' air courier division has expanded its existing desk-to-desk service to New York to provide same day delivery. The division's desk-to-desk services to Paris and Amsterdam are also being expanded.

The additional New York service operates Monday to Friday leaving Heathrow at 11.00 hrs arriving at New York at 13.35 hrs (US time), so allowing a same day delivery of packages.

For packages to Paris and Amsterdam, Pony Express now offers a twice daily service departing in the morning and the evening. In addition, the air courier division operates services to the other major cities of north America.

Further information: circle 579

Meadows aids major tractor export order

International freight forwarders Thomas Meadows has planned and co-ordinated the shipping arrangements for a phased, multi-million pound consignment of tractor and bulldozer units for Caterpillar Tractor.

By the end of July a large number of Caterpillar D8 track-type tractors, each weighing over 25.000 kg, had been shipped from Glasgow docks to India where they are to be used in state government projects.

The first shipment in the phased movement – organised by the control centre at Meadows (Paisley) office – left in May followed by further shipments in June and July.

Further information: circle 580

New container groupage service to Dubai

Brantford Al Ghanim Qutub Ltd, recently formed to handle the middle east interests of Brantford International, has started a groupage container service from depots at Thetford, Norfolk and Felixstowe, as well as offering reception facilities at the London international freight terminal.

Continuous reception arrangements are available at all depots, and the service will operate two departures a month.

This service will be operated in conjunction with Al Ghaith, Al Ghanim and Al Qutub Shipping Agencies of Dubai.

Further information: circle 581

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Overseas trade country data

Argentina

Trucks and buses. The Ministry of Economy through resolution 752 ME published on 7 July has decreed a reduction on import tariffs covering trucks and buses. Import tariffs on commercial vehicles will now be based on $3.6 per kg (formerly $6.0 per kg). In other words a true 45 per cent discount is now in effect.

Inquiries: OTAR 01-248 5757 ext. 476.

Australia

Textile and clothing quotas. The Australian government has announced that following its consideration of a report and recommendations by the textiles, clothing and footwear review committee it had decided that the quota allocation for textiles and items of apparel for the period 1 September 1979 to 29 February 1980 will be as follows:

Description	Total allocation
Acrylic apparel yarns	450 000 kg
Continuous filament polyamide and polyester yarns	
Carpet	1 098 000 kg
Other	1 330 000 kg
Wool worsted and wool blend yarns	550 000 kg
Woven man-made fibre fabrics	20 250 000 m²
Knitted man-made fibre fabrics	1 295 000 kg
Knitted pile fabrics of man-made fibres	50% of 1974/75 imports
Knitted net fabrics and fabrics resembling lace	$1 380 000 vfd
Tyre cord fabrics	810 000 kg
Woven woollen wool and wool blend fabrics	900 000 m²
Woven worsted wool and wool blend fabrics	1 200 000 m²
Terry towels	1 016 000 m²
Woven terry towelling	50% of 1975/76 imports
Unraised cotton sheeting	9 000 000 m²
Bed linen	$600 000 vfd
Curtains	1 900 000 m²
Sleeping bags	120 000 units
Woven coats for men and boys	108 500 garments
Suits for men and boys	38 500 garments
Trousers and jeans for men and boys	1 620 000 garments
Shorts for men and boys	787 500 garments
Men's and boys' woven shirts and knitted undergarment shirts	3 000 000 garments
Knitted outergarment shirts for men, boys and infants	3 000 000 garments
Blouses and shirts for women, girls and infants	4 275 000 garments
Dresses	1 635 000 garments
Certain outergarments for women, girls and infants	3 335 000 garments
Woven coats for women, girls and infants	302 000 garments
Woven sleepwear for women, girls and infants	1 000 000 garments
Men's and boys' woven sleepwear	600 000 garments
Knitted sleepwear	2 205 000 garments
Women's girls' and infants' knitted undergarments other than panties and the like	600 000 garments
Men's and boys' knitted under-garments and women's, girls' and infants' knitted panties and the like	3 400 000 garments
Panty hose	3 000 000 garments
Knitted tights	325 000 garments
Knitted hose and socks other than stockings and tights	3 105 000 garments
Knitted coats, jumpers, cardigans and like garments	5 782 500 garments
Adult tracksuits	284 000 garments
Knitted tracksuits, playsuits, etc. for children and infants	2 805 000 garments
Dressing gowns, kimonos, etc	126 500 garments
Leather coats and jackets	24 300 garments
Rainwear of pvc or rubber coated fabric	$380 000 vfd
Coats and jackets of pvc film	$155 000 vfd
Plastic pilches	2 500 000 garments
Babies napkins	330 000 units
Swimwear	384 250 garments

vfd value for duty

Inquiries: OTAR 01-248 5757 ext. 457

Jamaica

Retail sales tax. The Jamaica authorities have amended the rates of retail sales tax charged on the following items:

Description of goods	Rate of tax %
Motor cars	
a with an engine capacity not exceeding 1500 cc	20.31347
b with an engine capacity exceeding 1500 cc but not exceeding 2000 cc	45.39185
c with engine capacity exceeding 2000 cc	57
Other mechanically propelled vehicles designed for use wholly or mainly on the roads, including trailers but excluding motor cycles and invalid carriages.	13.322884

No further information is available.

Inquiries: OTAR 01-248 5757 ext. 7312.

Morocco

Import taxes. It has been announced that from 30 June the special tax is increased from 12 per cent to 15 per cent.

No further information is available.

Inquiries: OTAR 01-248 5757 ext. 462.

Car seat belts. It has been announced that from 19 July car seat belts and parts thereof (CCCN 87.06) are transferred from list C (prohibited) to list B (licence required).

No further information is available.

Inquiries: OTAR 01-248 5757 ext. 462.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel. direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

Philippines

Foodstuffs and containers. The Philippines government has introduced presidential decree 1628 which came into force on the 10 August 1979, whereby the import duty on the following items is amended as follows:

Tariff no./Description of articles	Rate of duty Ad val %
02.01	
Meat and edible offals of the animals falling within heading no. 01.01, 01.02, 01.03, or 01.04, fresh, chilled or frozen	5
02.02	
Dead poultry (that is to say, fowls, ducks, geese, turkeys and guinea fowls) and edible offals thereof (except liver), fresh, chilled or frozen:	
A Articles not included in subheading B hereof	30
B Chicken and ducks	50
02.03	
Poultry liver, fresh, chilled frozen, salted or in brine	50
02.04	
Other meat and edible meat offals, fresh chilled or frozen	50
02.06	
Meat and edible meat offals (except poultry liver), salted, in brine, dried or smoked	50
04.01	
Milk and cream, fresh, not concentrated or sweetened	20
05.04	
Guts, bladders and stomachs of animals, (other than fish), whole and pieces thereof	30
07.04	
Dried, dehydrated or evaporated vegetables, whole, cut, sliced, broken or in powder, but not further prepared	50
07.05	
Dried leguminous vegetables, shelled, whether or not skinned or split:	
A White beans, green peas and chick peas in bulk container exceeding 45 kg gross weight	5
B Other	30
09.02	
Tea	50
09.04	
Pepper of the genus *Piper*; pimento of the genus *Capsicum* or the genus *Pimenta*:	
A White pepper	20
B Other	40
11.08	
Starches;	
A Inulin	30
B Other	70
15.07	
Fixed vegetable oils, fluid or solid, crude, refined or purified:	
A Linseed, soya bean, palm, tung and oiticica	10
B Other	40
15.12	
Animal or vegetable oils and fats, wholly or partly hydrogenated or solidified or hardened by any other process, whether or not refined not further prepared	50
16.04	
Prepared or preserved fish, including caviar and caviar substitutes:	
A Mackerel and sardines	10
B Other	50
16.05	
Crustaceans and molluscs, prepared or preserved:	
A Squid and cuttlefish	20
B Other	50
18.01	
Cocoa beans, whole or broken, raw or roasted	30
19.01	
Malt extract	30
19.02	
Preparations of flour, meal, starch or malt extract of a kind used as infant food or for dietetic or culinary purposes, containing less than 50 per cent by weight of cocoa	20
20.01	
Vegetables and fruit, prepared or preserved by vinegar or acetic acid, with or without sugar, whether or not containing salt, spices or mustard	50
20.02	
Vegetable prepared or preserved otherwise than by vinegar or acetic acid:	
A Tomato paste	10
B Other	50
20.07	
Fruit juices (including grape must) and vegetables juices, whether or not containing added sugar, but unfermented and not containing spirit:	
A Concentrates	20
B Other	50
21.02	
Extracts, essences or concentrates, of coffee, tea or mate; preparations with a basis of those extracts, essences or concentrates	50
21.03	
Mustard flour and prepared mustard	50
21.04	
Sauces; mixed condiments and mixed seasonings	50
21.07	
Food preparations not elsewhere specified or included:	
A Non-alcoholic composite concentrates for making beverages; cheese flavouring powder	20
B Other	50
70.10	
Carboys, bottles, jars, pots, tubular containers and similar containers, of glass, of a kind commonly used for the conveyance or packing of goods; stoppers and other closures, of glass:	
A Carboys, demijohns, tubular containers, bottles, and vials for anti-biotics, serums and other injectibles	20
B Glass jars for baby food	40
C Other	40
73.13	
Sheets and plates, of iron or steel, hot-rolled or cold-rolled:	
A Uncoated	
1 Articles not included in sub-heading A2 hereof	10
2 Cold-rolled sheets	30
73.13	
B Coated or plated:	
1 Articles not included in sub-heading B2 hereof	10
2 Tinplates; chromeplated sheets; galvanised sheets with gauges from 16 to 36 USSG:	
a Tinplates when imported directly by food processors upon prior authorisation of the iron and steel authority	Free
B Other	40
76.04	
Aluminium foil (whether or not embossed, cut to shape, perforated, coated, printed, or backed with paper or other reinforcing material), of a thickness (excluding any backing) not exceeding 0.20 mm:	
A Aluminium reinforced paper packing material	10
B Other	20

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Portugal

Coffee. Decree-law 253/79, 27 July, states that coffee, under the heading 09.01 is now subject to an additional import duty of 90 escudos per kilogram.

Inquiries: OTAR 01-248 5757 ext. 458.

South Africa

Tariff application. Customs tariff application list TA26/79, published in the South African *Government Gazette*, 10 August, contains an application to the Board of Trade and Industries for increase in duty on:

Filter cloth, woven, in the piece or roll, not cut, classifiable under tariff subheading 59.17.90.

Those British trade organisations thought to be interested in the application are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

If any firm proposes to make independent representations to the South African authorities and requires further information concerning the application, it should address inquiries to CRE 01-215 5274.

United States

Speciality steel quotas. The *Federal Register*, 16 July, published a notice announcing an adjustment of speciality steel quotas. This adjustment sub-divides the global quotas for stainless steel bar and alloy tool steel, creating separate country quotas for Japan, Canada and Sweden in both categories and separate country quotas for Austria in the alloy tool steel category. The remainder of the quotas in both categories are available to all other countries.

Inquiries: CRE 01-215 5397.

Countervailing of community dextrins. Following a previous notice, 30 January, the United States' Department of the Treasury has issued a preliminary determination that the European community has granted a production subsidy and premium payments to producers of potato starches – the raw material base of dextrins. A final determination, including any appropriate countervailing duties, will be made by 8 December.

Inquiries: CRE 01-215 5629.

Methapyrilene. Following an earlier notice, 14 June, the Food and Drug Administration on 25 July announced that the import and export of methapyrilene and products containing the drug have been banned.

The Food and Drug Administration has requested that the following products contain methapyrilene be recalled by manufacturers: Sleep aids, antihistamines, cough and cold remedies to be recalled at both wholesale and retail levels, nasal sprays and tropical skin preparations at wholesale level only.

Inquiries: CRE 01-215 5629.

Economic Trends Annual Supplement No. 4

The monthly **Economic Trends** is well known. But did you know that the Central Statistical Office also publishes an **Annual Supplement** which provides a unique source for long runs of quarterly and annual data for the key series of economic indicators?

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ISBN 0 11 724992 0

Statistics

The economy: selected indicators[1]

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			of which					
			Total	Manufacturing industry	Distributive and service industries excl. shipping	Total	Manufacturing industry	Wholesalers'	Retailers'	Current balance	Visible balance	Invisible balance
	at 1975 prices		at 1975 prices			at 1975 prices				at current prices		
Base of index Series in Stock level at end-1977	1975	£ million	£ million			£ million 34,469	19,995	4,540	3,181	£ million		
1973	103.3	65 586	21 609	3 504	4 674	2 983	1 336	432	624	−967	−2 383	1 416
1974	101.4	64 162	21 173	3 822	4 605	1 459	1 288	361	−180	−3 550	−5 235	1 685
1975	100.0	63 328	20 536	3 522	3 841	−1 623	−1 221	−249	−100	−1 787	−3 236	1 449
1976	102.9	63 479	20 395	3 345	3 926	245	316	131	13	−1 072	−3 601	2 529
1977	104.9	62 897	19 961	3 573	4 325	949	442	266	29	371	−1 744	2 115
1978	108.2	66 431	20 456	3 856	4 677	1 034	597	6	333	443	−1 175	1 618
1976 3rd qtr	103.3	15 910	5 177	849	1 005	160	99	81	46	−421	−1 136	715
4th qtr	104.2	15 989	4 955	856	1 014	1 014	1 264	17	27	−292	−966	674
1977 1st qtr	103.8	15 610	4 821	851	1 030	402	235	82	117	−401	−946	545
2nd qtr	104.5	15 535	5 010	879	1 044	289	97	179	4	−253	−779	526
3rd qtr	104.8	15 849	5 057	910	1 103	−73	−6	−80	−59	513	−3	516
4th qtr	106.5	15 903	5 073	932	1 149	331	116	85	−33	512	−16	528
1978 1st qtr	106.0	16 326	5 152	923	1 162	323	38	81	62	−369	−596	227
2nd qtr	108.4	16 456	5 147	963	1 174	295	272	−62	128	208	−173	381
3rd qtr	109.2	16 831	5 132	982	1 162	304	175	45	54	154	−367	521
4th qtr	109.2	16 818	5 025	988	1 179	112	112	−59	89	450	−39	489
1979 1st qtr	107.4	17 609 pe	4 927	946	1 209	378	83	100	87	−787	−11 81	394
2nd qtr									49	−231 p	−561	330 p
% change last 2 qtrs on prev. 2 qtrs.	−0.5	+2.9	−3.2	−0.6	+2.2							
on a year earlier	+1.9	+5.6	−2.7	+4.3	+3.3							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Export	Import
						% increase on a year earlier	basic materials and fuel used	manufactured products: home sales		mid-month count	% of total employees	mid-month count	On a balance of payment basis	
	at 1975 prices		at 1971 prices	monthly averages	(not seasonally adjusted)				(old series)				at 1975 prices	
Base of index £m in base year Series in	1975	1975	1971 16,296	thousands	Jan. 1974		1975	1975	Jan. 1970	thousands		thousands	1975 19,463	1975 22,699
1974	105.1	106.5	109.0	102.8	108.5	16.0	86.8	81.8	179.1	599.7[2]	2.6[2]	301.6[2]	104.2	109.7
1975	100.0	100.0	106.7	97.2	134.8	24.2	100.0	100.0	226.6	929.1	3.9	148.0[2]	100.0	100.0
1976	102.0	101.4	106.5	104.7	157.1	16.5	127.0	117.3	261.8	1 269.3[2]	5.3[2]	119.7[2]	109.7	105.6
1977	105.8	102.8	103.6	107.1	182.0	15.8	145.6	140.5	288.5	1 378.0	5.7	155.8[2]	118.9	107.2
1978	109.8	103.7	109.2	130.1	197.1	8.3	144.6	153.3	330.2	1 376.5	5.7	210.4	122.9	112.6
1977 1st qtr	105.6	103.9	103.3	102	174.1	16.5	144.8	133.0	280.2	1 333.3	5.5	..	115.9	108.8
2nd qtr	105.5	102.4	102.4	104	181.9	17.4	148.8	139.6	284.4	1 353.4	5.6	154.3	117.7	110.6
3rd qtr	106.3	103.0	104.2	110	184.7	16.5	146.5	143.8	289.1	1 403.1	5.8	153.7	124.6	107.3
4th qtr	105.9	101.8	104.7	113	187.4	13.1	142.2	145.8	300.3	1 422.2	5.9	163.6	117.3	102.3
1978 1st qtr	106.9	102.3	106.4	128	190.6	9.5	140.2	149.2	310.9	1 415.7	5.9	185.9	119.6	113.5
2nd qtr	110.7	104.5	107.9	133	195.8	7.7	146.3	151.8	327.8	1 388.6	5.7	206.3	122.2	109.7
3rd qtr	111.6	105.1	110.7	133	199.2	7.8	144.9	154.8	335.7	1 367.9	5.7	215.2	124.8	114.9
4th qtr	101.0	102.7	111.7	127	202.6	8.1	147.1	157.3	346.4	1 333.7	5.5	234.2	124.8	112.3
1979 1st qtr	109.7	102.0	110.3	131	208.9	9.6	152.2	161.6	356.5	1 356.7	5.6	232.6	110.3	113.3
2nd qtr	114.5 p	106.0 p	116.7	179	216.6	10.6	161.3 p	168.0 p		1 304.2	5.4	255.0	134.2	129.0
1978 May	110.1	103.5	108.2	127	195.7	7.7	146.8	151.9	326.2	1 384.8	5.7	205.6	120.5	113.3
Jun	111.1	104.9	108.6	142	197.2	7.4	147.0	152.7	333.0	1 378.1	5.7	213.4	121.9	111.1
Jul	111.7	105.1	111.0	111	198.1	7.8	145.8	153.8	333.2	1 370.2	5.7	211.1	125.7	114.3
Aug	112.2	105.9	111.7	142	199.4	8.0	144.2	154.8	334.7	1 373.4	5.7	211.8	124.5	111.3
Sep	110.8	104.4	109.6	144	200.2	7.8	144.8	155.7	339.2	1 360.2	5.6	222.8	124.3	119.1
Oct	108.9	102.0	110.2	133	201.1	7.8	145.7	156.6	344.5	1 349.9	5.6	231.8	125.9	110.8
Nov	109.9	102.7	110.5	126	202.5	8.1	147.3	157.1	344.5	1 331.7	5.5	234.9	122.5	113.7
Dec	111.3	103.5	113.8	121	204.2	8.4	148.3	158.3	350.1	1 319.6	5.5	235.9	126.0	112.5
1979 Jan	104.1	93.9	109.6	121	207.2	9.3	150.8	160.0	344.7	1 342.1	5.6	235.7	113.0	107.1
Feb	111.8	104.6	110.4	117	208.9	9.6	152.2	161.7	355.6	1 366.5	5.7	228.9	100.7	117.0
Mar	113.0	107.5	110.8	156	210.6	9.8	153.5	163.2	369.3	1 361.5	5.6	233.1	117.3	115.7
Apr	113.3	105.3	115.4	158	214.2	10.1	158.4	165.5	368.1	1 327.4	5.5	245.3	128.4	127.2
May	114.3	105.3	113.5	172	215.9	10.3	161.0	167.7	372.4 p	1 306.4	5.4	257.3	133.6	127.8
Jun	116.0 p	107.2 p	120.3	208	219.6	11.4	164.5 p	170.8 p		1 278.7	5.3	262.4	140.7	132.0
Jul			108.5 p				164.7 p	174.5 p		1 278.7	5.3	253.0		
% change latest 3 months on prev. 3 months	+4.4	+3.9	+2.2	+36.5	+3.7		+5.6	+4.6	+5.7	−4.7		+9.2	+21½	+14
on a year earlier	+3.4	+1.4	+4.9	+34.8	+10.6		+11.5	+11.9	+15.0	−6.5		+22.6	+10	+17½

p Provisional. pe Preliminary estimate. [1] Including figures published on or before 14 August 1979. [2] Average of available months.

Inquiries: 01-215 3453

Retail sales: provisional estimate for July

Volume

The provisional estimate of the seasonally adjusted index of the volume of retail sales in July is 108½ (1971 = 100), indicating a fall of about 10 per cent from the high June level.

However, taking June and July together compared with April and May, there was little change in total sales and in the sales of both food and non-food shops. In the first seven months of this year the average volume of total sales was about 1½ per cent higher than the average level in the second half of last year.

The sharp movements of sales in June and July were influenced by the budget on 12 June which raised VAT with effect from 18 June. With such sharp movements the provisional estimate is subject to greater uncertainty than usual.

Value

Based on non-seasonally adjusted data, the provisional estimate of the value of total sales in July was 11 per cent higher than in July 1978. In the first seven months of 1979, the average value of sales was 14 per cent higher than in the corresponding period of 1978.

Retail sales: volume and value

	Volume seasonally adjusted index (1971 = 100)		Value not seasonally adjusted – percentage change compared with a year earlier
1978		**1978**	
1st qtr	106.4	1st qtr	+13
2nd	107.9	2nd	+15
3rd	110.7	3rd	+14
4th	111.7	4th	+14
1979		**1979**	
1st qtr	110.3	1st qtr	+13
2nd	116.7	2nd	+17
1978		**1978**	
Apr	106.9	Apr	+16
May	108.2	May	+15
June	108.6	June	+14
July	111.0	July	+15
1979		**1979**	
Apr	115.4	Apr	+14
May	113.5	May	+14
June	120.3	June	+20
July	108½ p	July	+11 p

p Provisional.

Inquiries: Department of Trade, Economics and Statistics Division 6C, Room 351, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3705.

Notes

The volume index is given to the nearest half per cent. The percentage increase in value compared with a year earlier is given to the nearest whole number.

Estimates are based on early returns to the monthly inquiry. These returns cover approaching one half, by turnover, of information available at the final stage. Over the last 12 months the average difference (ignoring sign) between provisional and final estimates was 0.5 per cent. However, as with all estimates based on partial data, caution must be exercised in interpreting a single month's figures.

When using the volume figures, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which volume changes have been measured is likely to have been reduced in recent periods.

The value estimates are compiled inclusive of VAT, and will, therefore, reflect changes in the rates of VAT. The volume estimates, however, are not affected by these changes since the retail price indices used to 'deflate' the value data are themselves inclusive of VAT.

The seasonally adjusted series include, where appropriate, adjustments for the timing of holidays. No adjustments are made to the non-seasonally adjusted data.

The final figures for July will be published in a press notice on Tuesda ', 4 September.

Catering trades' turnover in the second quarter 1979

Catering turnover, at current prices and after seasonal adjustment, was 7 per cent higher in the second quarter of 1979 compared with the first quarter.

Recent percentage increases compared with corresponding quarters a year earlier (at current prices but not seasonally adjusted) for the main kinds of business are:

	All caterers	Licensed hotels and holiday camps	Restaurants, cafes and fish and chip shops	Public houses	Canteens
1978					
1st qtr	12	17	10	12	7
2nd	12	17	12	9	13
3rd	12	17	13	10	9
4th	12	21	14	10	7
1979					
1st qtr	10	17 r	10 r	8 r	13 r
2nd	15	17	15	14	11

The Easter bank holiday fell entirely in the first quarter in 1978 and entirely in the second quarter in 1979.

Compared with the second quarter of 1978, catering turnover in the second quarter of 1979 increased by 15 per cent overall; the increases recorded for each kind of business were: licensed hotels and holiday camps 17 per cent; restaurants, cafes and fish and chip shops 15 per cent; public houses 14 per cent and canteens 11 per cent.

Inquiries: 01-215 3177.

Turnover of all caterers, seasonally adjusted

Index numbers of turnover per week [1]
Value at current prices (turnover in 1969 = £2,533 million)
Great Britain 1969 = 100

	Year	1st qtr	2nd qtr	3rd qtr	4th qtr
1969	100	97	100	102 *	103
1970	108	105	108	109	112
1971	118	115	117	119	122
1972	131	125	128	133	138
1973	148	142	146	150	153
1974	170	159	166	174	180
1975	201	187 *	198	208	210
1976	230	216	229	238	236
1977	256	246	253	262	265
1978	287	272	285	294	297
1979		303	324		

[1] Turnover includes VAT; the quarterly periods consist of 13 weeks except * which are of 14 weeks. The second quarter 1979 period was the 13 weeks from 1 April 1979 to 30 June 1979, the second quarter 1978 period was the 13 weeks from 2 April 1978 to 1 July 1978.
r Revised figure.

Plans dropped for 1981 shops inquiry

Ministers have decided, in the light of the resources likely to be available within the Business Statistics Office in the near future, that it will not be possible to carry out a shops inquiry for 1981. There are no current plans for a shops inquiry to be conducted for a later year.

The decision to abandon the proposed inquiry will relieve retailers of a significant burden of form-filling. Although the inquiry would have collected only simple information and every attempt would have been made to use information already available within central government, it is estimated that it would have been necessary to mail about 150 000 forms to retail businesses to collect information on about 270 000 shops.

The Business Statistics Office had been examining ways in which statistics of retail shops for geographic areas such as regions, local authority areas and shopping centres might be compiled. Such information was last provided in the results of the 1971 census of distribution and is not available from the annual sample inquiries addressed to retailing businesses, which was started for the year 1976 after it had been decided to abandon the past system of periodic large-scale censuses of distribution.

Proposals for a comprehensive shops inquiry for 1981 which would have provided statistics of turnover, employment and selling space for areas were discussed with a number of bodies including the statutory Distribution Statistics Advisory Committee.

Retail shops inquiry for 1977

A small retail shops inquiry for 1977 was carried out by the BSO last year to provide some results of use to planners and retailers and to assess the practical problems involved in the large-scale inquiry contemplated for 1981.

Results of the inquiry for 1977 have been published in Business Monitor SD027 (HMSO, £1.50). These show, for each area covered, statistics of turnover, employment and selling space by kind of retail business. The areas are:

Districts: Bath (Avon), Cannock Chase (Staffs), and Darlington (Co Durham).

Shopping centres: Bath (Avon), Cannock (Staffs), Corby (Northants), Crawley (West Sussex), Cwmbran (Gwent), Darlington (Co Durham), Dunfermline (Fife), Grimsby – Freeman Street (Humberside), Grimsby – Victoria Street (Humberside), London Borough of Hackney – Mare Street, London Borough of Hillingdon – Uxbridge, London Borough of Islington – Holloway, Merthyr Tydfil (Mid Glamorgan), Rugeley (Staffs), and Stirling (Central).

Further information

Further information about the inquiry for 1977 can be obtained from the Business Statistics Office, Cardiff Road, Newport Gwent NPT 1XG, tel. Newport (0633) 56111 ext. 2212.

Retailers' stocks in June

Based on the non-seasonally adjusted data on table 1, the level of retailers' stocks at book values in June was £105 million higher than the previous month and 18 per cent higher than a year earlier; at constant (1975) prices the level was 8 per cent higher than a year earlier.

The estimate of the value of physical increase of retailers' stocks at 1975 prices and seasonally adjusted (table 2) suggests an increase of £34 million. This latest increase appears to suggest that some retailers are continuing to hold relatively high levels of stocks despite the high level of sales in June influenced by the budget on June 12 which raised VAT with effect from June 18. The ratio of stocks to sales in June was at a low level because of the sharp increase in sales.

Inquiries: Department of Trade, Economics and Statistics Division 6C, Room 351, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3705.

Table 1 **Level of retailers' stocks**

£ million — At cost at end of month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
At book values												
1975	2 766	2 814	2 947	2 856	2 948	2 985	2 962	2 963	3 139	3 452	3 700	3 333
1976	3 151	3 195	3 388	3 389	3 382	3 379	3 311	3 319	3 547	3 941	4 229	3 799
1977	3 656	3 726	4 095	4 163	4 165	4 220	4 029	4 037	4 286	4 695	5 170	4 417
1978	4 197	4 220	4 522	4 597	4 625	4 744	4 637	4 658	4 932	5 458	6 004	5 218
1979	4 812	4 897	5 416	5 485	5 487	5 592						
Change in book values												
1975	−120	48	133	−91	92	37	−23	1	176	313	248	−367
1976	−182	44	193	1	−7	−3	−68	8	228	394	288	−430
1977	−143	70	369	68	2	55	−191	8	249	409	475	−753
1978	−220	23	302	75	28	119	−107	21	274	526	546	−786
1979	−406	85	519	69	2	105						
Percentage change on a year earlier												
1975	15	17	17	10	10	10	10	11	13	14	16	15
1976	14	14	15	19	15	13	12	12	13	14	14	14
1977	16	17	21	23	23	25	22	22	21	19	22	16
1978	15	13	10	10	11	12	15	15	15	16	16	18
1979	15	16	20	19	19	18						
At constant (1975) prices – percentage change on a year earlier												
1975	−7	−6	−7	−12	−12	−11	−11	−10	−7	−5	−3	−3
1976	−2	−2	—	5	2	1	1	1	1	2	1	—
1977	1	1	4	5	5	6	3	3	3	2	5	1
1978	1	1	−1	—	1	3	6	6	7	8	8	10
1979	7	8	11	10	9	8						

Table 2 **Retailers' stocks at 1975 prices**

Seasonally adjusted — £ million

	Stocks level	Value of physical increase
1971		
1st qtr	2 720	−34
2nd	2 722	2
3rd	2 738	16
4th	2 766	28
1972		
1st qtr	2 776	10
2nd	2 834	58
3rd	2 809	−25
4th	2 795	−14
1973		
1st qtr	2 934	139
2nd	3 248	314
3rd	3 323	75
4th	3 419	96
1974		
1st qtr	3 356	−63
2nd	3 409	53
3rd	3 315	−94
4th	3 239	−76
1975		
1st qtr	3 134	−105
2nd	3 039	−95
3rd	3 079	40
4th	3 139	60
1976		
1st qtr	3 146	7
2nd	3 079	−67
3rd	3 125	46
4th	3 152	27
1977		
1st qtr	3 269	117
2nd	3 273	4
3rd	3 214	−59
4th	3 181	−33
1978		
1st qtr	3 243	62
2nd	3 371	128
3rd	3 425	54
4th	3 514	89
1979		
1st qtr	3 601	87
2nd	3 650	49
1979		
January	3 421	−93
February	3 415	−6
March	3 601	186
April	3 633	32
May	3 616	
June	3 650	34

Table 3 **Relationship of retailers' stocks to retail sales**

Index numbers – fourth quarter 1974 = 100 — Seasonally adjusted

	Stock levels at 1975 prices	Retail sales at 1971 prices	Ratio of stocks to sales
1966	77	83	93.6
1967	80	84	94.5
1968	84	87	95.9
1969	85	88	97.5
1970	85	90	94.8
1971	85	91	93.7
1972	86	96	89.9
1973	106	100	105.0
1974	100	99	100.7
1975	97	97	99.7
1976	97	97	100.3
1977	98	94	104.0
1978	108	99	109.0
1976			
1st qtr	97	96	100.7
2nd	95	97	97.8
3rd	96	98	98.8
4th	97	97	100.7
1977			
1st qtr	101	94	107.2
2nd	101	93	108.3
3rd	99	95	104.5
4th	98	95	103.0
1978			
1st qtr	100	97	103.3
2nd	104	98	105.9
3rd	106	101	104.8
4th	108	102	106.6
1979			
1st qtr	111	100	110.6
2nd	113	106	106.0
1979			
January	106	100	105.8
February	105	101	104.8
March	111	101	110.1
April	112	105	106.7
May	112	103	108.0
June	113	110	102.8
July		99 p	

p provisional

Notes for table 3

1 The index numbers of the level of stocks relate to the end of each time period; the index of sales refers to retail sales during the period.

2 The 1971 = 100 index of retail sales has been rebased on the fourth quarter of 1974 for the purpose of this table.

3 The index numbers of the stocks sales ratio are calculated from unrounded estimates of the data in the previous two columns.

Notes

1 The book values are valued exclusive of VAT.

2 For the estimates at constant prices, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus the relative accuracy with which constant price changes have been measured is likely to have been reduced in recent periods.

3 The statistics given in table 2 were introduced in an article in *Trade and Industry*, 28 March 1975, and those in table 3 were introduced in an article in the issue of 17 March 1978.

4 Long-run series back to 1970 for table 1 and to 1967 for table 2 were included in the article in *Trade and Industry*, 22 September 1978.

Vehicle production: provisional estimate for July

Provisional estimates of vehicle production in the United Kingdom in the four weeks ending 28 July 1979 are shown below. More detailed production figures are due to appear in *Trade and Industry*, 31 August 1979.

Thousands

		Passenger cars		Commercial vehicles	
	No. of weeks	Recorded	Seasonally adjusted (monthly average)	Recorded	Seasonally adjusted (monthly average)
1975	52	1 268	106	380.7	31.7
1976	53	1 333	111	372.1	31.0
1977	52	1 316	110	398.3	33.2
1978	52	1 223	102	384.5	32.0
1978					
Jan	4	111	111	31.1	33.4
Feb	4	108	112	30.7	30.7
Mar	5	139	121	41.9	35.4
Apr	4	119	117	35.0	36.0
May	4	122	104	37.8	34.6
Jun	5	122	108	39.5	34.3
Jul	4	65	96	27.2	33.5
Aug	4	89	115	21.2	31.3
Sep	5	107	107	33.8	32.1
Oct	4	79	83	26.3	26.2
Nov	4	58	55	24.3	24.4
Dec	5	104	95	35.7	32.5
1979					
Jan	4	92	93	32.0	34.5
Feb	4	100	104	37.5	37.7
Mar	5	133	110	50.4	40.3
Apr	4	97	101	38.0	41.6
May	4	105	90	40.0	36.7
Jun	5	114	101	43.4	37.9
Jul	4	67	99	29.7	36.6

Inquiries: Department of Industry, Millbank Tower, Millbank, London SW1P 4QU, tel. 01-211 7272.

Big growth in unaccompanied ro-ro traffic

This is the first of a series of quarterly statistics based on surveys by the Department of Transport on traffic carried by ro-ro ferries between Great Britain and the continent. An introductory feature was published in *Trade and Industry*, 18 May, page 296. Tables 1, 2, 3 and 4 below correspond to tables 3, 4, 5 and 6 in the 18 May article, when figures were given for earlier years.

The number of vehicles on ro-ro services from Great Britain to the continent rose to 526 500 in 1978, an increase of 9.6 per cent over 1977. This compares with a 14 per cent growth rate the previous year.

The most noticeable feature of 1978 was the re-emergence of unaccompanied vehicle traffic, which increased by 18.4 per cent over 1977 to some 246 000 vehicles. Powered vehicles retained the major share of traffic overall but this fell from 57 per cent in 1977 to 53 per cent in 1978. UK registered vehicles accounted for 31 per cent, slightly reduced from 1977; while foreign registered vehicles appeared to have suffered most from the increase in unaccompanied vehicle traffic,

Table 1 **Road vehicles carried on ro-ro ferries from Great Britain to continental Europe**

Thousand (percentage)

	1977	1978	1977				1978			
			1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr
All powered vehicles	272.7 (57)	280.5 (53)	64.0 (55)	66.9 (57)	67.4 (58)	74.4 (58)	66.0 (54)	70.6 (53)	67.3 (52)	76.5 (53)
of which:										
UK registrations	154.8 (32)	162.2 (31)	37.3 (32)	38.3 (33)	38.3 (33)	40.9 (32)	36.8 (30)	41.6 (31)	39.8 (31)	44.0 (31)
Foreign registrations	92.4 (25)	104.0 (22)	21.7 (23)	22.7 (24)	22.2 (25)	25.9 (26)	24.2 (24)	26.0 (22)	24.5 (21)	29.3 (22)
Unknown nationality	25.4	14.3	5.0	6.0	6.9	7.6	5.0	3.1	3.1	3.2
Unaccompanied vehicles	207.7 (43)	246.0 (47)	52.4 (45)	50.9 (43)	49.5 (42)	54.9 (42)	55.2 (46)	62.6 (47)	60.9 48)	67.4 (47)
All vehicles	480.4 (100)	526.5 (100)	116.5 (100)	117.8 (100)	116.9 (100)	129.2 (100)	121.2 (100)	133.2 (100)	128.2 (100)	143.9 (100)

Table 2 **Powered vehicles by country of registration**

Thousand (percentage)

	1977	1978	1977				1978			
			1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr
UK	154.8 (57)	162.2 (58)	37.3 (58)	38.3 (57)	38.3 (57)	40.9 (55)	36.8 (56)	41.6 (59)	39.8 (59)	44.0 (59)
Other EEC	77.0 (28)	84.7 (30)	18.3 (29)	19.0 (29)	18.4 (28)	21.3 (29)	20.1 (30)	21.2 (30)	19.6 (29)	23.7 (31)
France	35.1 (13)	42.7 (15)	8.8 (14)	8.8 (13)	7.9 (12)	9.6 (13)	9.8 (15)	11.4 (16)	9.7 (14)	11.9 (16)
Netherlands	16.0 (6)	13.7 (5)	3.9 (6)	4.0 (6)	4.0 (6)	4.1 (5)	3.4 (5)	3.3 (5)	3.3 (5)	3.6 (5)
Belgium	9.7 (4)	13.0 (5)	2.3 (4)	2.6 (4)	2.2 (3)	2.6 (3)	2.7 (4)	3.3 (5)	3.0 (4)	3.9 (5)
West Germany	5.3 (2)	6.6 (2)	1.2 (2)	1.2 (2)	1.2 (2)	1.8 (2)	1.3 (2)	1.6 (2)	1.8 (3)	1.9 (2)
Italy	4.4 (2)	4.7 (2)	1.0 (2)	1.1 (2)	1.2 (2)	1.2 (2)	1.0 (2)	1.1 (2)	1.1 (2)	1.5 (2)
Irish Republic	5.8 (2)	3.0 (1)	1.0 (1)	1.2 (2)	1.8 (3)	1.9 (3)	1.6 (2)	0.4 —	0.4 (1)	0.6 (1)
Denmark [1]	0.7 —	0.9 —	0.2 —	0.1 —	0.2 —	0.2 —	0.2 —	0.2 —	0.2 —	0.2 —
Non-EEC	15.4 (6)	18.8 (7)	3.4 (5)	3.6 (5)	3.8 (5)	4.7 (6)	3.9 (6)	4.5 (6)	4.9 (7)	5.6 (7)
Austria	1.7 (1)	1.9 (1)	0.4 (1)	0.5 (1)	0.5 (1)	0.5 (1)	0.4 (1)	0.4 (1)	0.5 (1)	0.6 (1)
Czechoslovakia	3.3 (1)	3.5 (1)	0.9 (1)	0.8 (1)	0.8 (1)	0.8 (1)	0.8 (1)	0.9 (1)	0.8 (1)	1.0 (1)
Spain	3.5 (1)	5.1 (2)	0.6 (1)	0.6 (1)	0.8 (1)	1.6 (2)	1.0 (1)	1.0 (1)	1.2 (2)	1.9 (3)
Switzerland	3.1 (1)	3.6 (1)	0.8 (1)	0.8 (1)	0.7 (1)	0.9 (1)	0.8 (1)	1.0 (1)	0.9 (1)	1.0 (1)
Unidentified	25.4 (9)	14.8 (5)	5.0 (8)	6.0 (9)	6.9 (10)	7.6 (10)	5.2 (8)	3.3 (5)	3.1 (5)	3.2 (4)
All countries	272.7 (100)	280.5 (100)	64.0 (100)	66.9 (100)	67.4 (100)	74.4 (100)	66.0 (100)	70.6 (100)	67.3 (100)	76.5 (100)

[1] No breakdown is available of country of registration of vehicles on ferry routes to Denmark which has resulted in an apparent decline in the number of Danish vehicles.

Table 3 **Country of disembarkation**

Thousand (percentage)

	1977	1978	1977				1978			
			1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr
France	164.4 (34)	174.1 (33)	39.7 (34)	41.3 (35)	38.3 (33)	45.1 (35)	40.9 (34)	44.9 (34)	41.4 (32)	46.8 (32)
Belgium	149.7 (31)	154.9 (29)	36.7 (32)	35.9 (31)	38.9 (33)	38.2 (30)	34.8 (29)	38.7 (29)	37.4 (29)	44.0 (30)
Netherlands	102.7 (21)	126.0 (24)	24.4 (21)	25.3 (21)	24.1 (21)	28.9 (22)	28.6 (23)	31.6 (24)	32.6 (26)	33.2 (23)
Denmark and West Germany [1]	43.1 (9)	46.9 (9)	10.4 (9)	10.2 (9)	11.0 (9)	11.5 (9)	10.8 (9)	11.8 (9)	11.7 (9)	12.5 (9)
Others [1, 2]	20.5 (4)	24.7 (5)	5.2 (4)	5.1 (4)	4.6 (4)	5.5 (4)	6.0 (5)	6.3 (4)	5.2 (4)	7.3 (5)
All countries	480.4 (100)	526.5 (100)	116.5 (100)	117.8 (100)	116.9 (100)	129.2 (100)	121.2 (100)	133.2 (100)	128.2 (100)	143.9 (100)

[1] For reasons of confidentiality a finer breakdown cannot be made. [2] Finland, Norway, Portugal, Spain and Sweden.

Table 4 **Road vehicles by port group** [1]

Thousand (percentage)

	1977	1978	1977				1978			
			1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr
Powered vehicles										
North Sea	50.7 (19)	47.8 (17)	11.9 (19)	12.7 (19)	13.1 (19)	13.1 (18)	11.3 (17)	10.9 (15)	12.4 (18)	13.1 (17)
Strait of Dover	181.3 (66)	194.3 (66)	42.1 (66)	44.4 (66)	44.4 (66)	50.4 (68)	45.3 (69)	49.3 (70)	46.2 (69)	53.4 (70)
English Channel	40.7 (15)	38.5 (14)	10.0 (15)	9.9 (15)	9.9 (15)	10.9 (14)	9.5 (14)	10.4 (15)	8.7 (13)	10.0 (13)
All ports	272.7 (100)	280.5 (100)	64.0 (100)	66.9 (100)	67.4 (100)	74.4 (100)	66.0 (100)	70.6 (100)	67.3 (100)	76.5 (100)
Unaccompanied vehicles										
North Sea	155.2 (75)	185.6 (75)	37.9 (72)	36.8 (72)	38.7 (78)	41.7 (76)	42.7 (77)	47.4 (76)	45.6 (75)	50.0 (74)
Strait of Dover	28.7 (14)	34.5 (14)	8.1 (15)	7.3 (14)	5.9 (12)	7.3 (13)	7.2 (13)	8.8 (14)	8.6 (14)	9.9 (15)
English Channel	23.7 (11)	25.9 (11)	6.3 (13)	6.7 (14)	4.9 (10)	5.8 (11)	5.3 (10)	6.4 (10)	6.8 (11)	7.4 (11)
All ports	207.7 (100)	246.0 (100)	52.4 (100)	50.9 (100)	49.5 (100)	54.9 (100)	55.2 (100)	62.6 (100)	60.9 (100)	67.4 (100)
All vehicles										
North Sea	205.9 (43)	233.3 (44)	49.9 (43)	49.5 (42)	51.8 (44)	54.8 (42)	53.9 (45)	58.4 (44)	57.9 (45)	63.2 (44)
Strait of Dover	210.1 (44)	228.8 (44)	50.3 (43)	51.7 (44)	50.3 (43)	57.8 (45)	52.5 (43)	58.1 (44)	54.8 (43)	63.3 (44)
English Channel	64.4 (13)	64.4 (12)	16.4 (14)	16.6 (14)	14.8 (13)	16.7 (13)	14.8 (12)	16.7 (12)	15.5 (12)	17.4 (12)
All ports	480.4 (100)	526.5 (100)	116.5 (100)	117.8 (100)	116.9 (100)	129.2 (100)	121.2 (100)	133.2 (100)	128.2 (100)	143.9 (100)

[1] North Sea: all ports on east coast from Thames estuary northwards; Strait of Dover: Dover, Folkestone, Ramsgate; English Channel: all ports on south coast, west of Folkestone.

their overall share declining from 25 per cent in 1977 to 22 per cent in 1978.

The substantial increase in unaccompanied traffic was observed both through the ports of east Kent and through east coast ports but in the latter case this increase was particularly noticeable in terms of absolute numbers of vehicles carried since 75 per cent of unaccompanied vehicles are carried by services from these ports. Services to the Netherlands account for the bulk of this traffic and it was here that the increase in unaccompanied traffic had the biggest impact. Unaccompanied vehicle traffic to the Netherlands increased by 23 per cent over 1977 and while powered vehicle traffic fell by some 6 per cent, these services increased their overall share of ro-ro traffic from 21 per cent in 1977 to 24 per cent in 1978.

Other changes in the pattern of traffic were less marked. The ports serving the Strait of Dover routes further strengthened their share of powered vehicle traffic which increased to 69 per cent while the remaining traffic, handled by North Sea and English Channel ports, fell not only in relative terms but also in absolute numbers. In the case of North Sea ports the compensating increases in the volume of unaccompanied vehicle traffic have already been mentioned. In the English Channel ports, the loss of powered vehicle traffic was only just balanced by an increase of unaccompanied vehicles and the overall volume of traffic remained unchanged from 1977.

Inquiries: Department Transport, Room S12/02, 2 Marsham Street, London SW1P 3EB, tel. 01-212 7379.

R&D funding trebles

Expenditure on research and development almost trebled between 1964 and 1975, but in volume terms the 1975 level was slightly lower than the 1964 level. In 1975 over £2,000 million was spent on R&D, about 2.1 per cent of gross domestic product.

The volume of R&D expenditure peaked in the late 1960s. Expenditure in 1972 was less than in 1966 and had fallen back further by 1975. In the early 1970s, R&D carried out by industry fell more sharply than that carried out by government. By 1975 the volume of R&D performed by both industry and government was lower than in 1964.

Central government expenditure on R&D at constant prices rose between 1970 and 1975, but fell sharply in 1976 and 1977. The rise between 1970 and 1975 was mainly due to an increase in government financed R&D performed by other sectors. R&D carried out by the government changed little in volume terms.

Expenditure on defence R&D, as a percentage of gdp, fell sharply between 1964 and 1969, and has since risen slowly. Government financed civil research expenditure showed a rising trend between 1964 and 1974, and a marked fall between 1975 and 1977.

An article in the July issue of *Economic Trends* gives full details of total R&D financed and carried out in the United Kingdom in 1975 and government figures for years up to 1977-78.

Domestic furniture: deliveries and orders in June

Domestic furniture deliveries for June are provisionally estimated at £86.2 million, at current prices, which gives a seasonally adjusted index of deliveries for the month of 120. The average for the latest three months, April to June, is 113 which is 6.1 per cent higher than the revised figure for the previous three months, January to March, and 0.6 per cent higher than the figure for the same period in 1978.

The index of orders on hand, on a seasonally adjusted basis, yields a provisional figure of 102 for May. The average for the three months April to June is 92 which is a rise of 2.1 per cent from the revised figure for the previous three months, and 12.4 per cent higher than the corresponding period last year.

The indices are given on 1975 constant price basis, with 1975 = 100. When price increases are large, the problems associated with revaluation to constant prices become more acute. Thus relative accuracy with which volume changes have been measured is likely to have been reduced in times of high inflation.

Inquiries: Department of Industry, Room 107, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 8662.

		Index of deliveries (1975 = 100)		Index of orders on hand end of month or centred (average 1975 = 100)	
Domestic furniture	Deliveries £m current values	Unadjusted	Seasonally adjusted	Unadjusted	Seasonally adjusted
1975	578.9		100		100
1976	660.2		102		87
1977	751.7		100		75
1978	910.7		108		85
1978					
1st qtr	222.7 r	108	105	84 r	78 r
2nd	227.3 r	109	112	78 r	81 r
3rd	211.6 r	99	111 r	80 r	86 r
4th	249.1 r	115	107 r	99 r	96 r
1979					
1st qtr	256.7 r	113 r	106 r	96	90 r
2nd	245.7 p	106 p	113 p	87 p	92 p
1978					
Jan	71.1 r	105 r	103	87	81 r
Feb	73.3 r	107 r	105 r	86 r	79 r
Mar	78.3 r	114 r	108 r	80 r	77
Apr	77.0 r	111	114 r	82	84
May	73.5 r	106 r	110 r	78 r	82
Jun	76.8 r	110	113	71	79
Jul	58.6 r	83 r	109 r	74 r	82
Aug	67.5 r	94 r	112 r	86	89 r
Sep	85.5 r	119	113	91 r	93 r
Oct	85.2	119 r	102	95	95
Nov	91.0	126 r	106	105	98
Dec	72.8 r	100	111	100	96
1979					
Jan	78.8 r	106 r	100 r	100 r	92 r
Feb	83.3 r	110 r	108 r	95 r	86 r
Mar	94.6 r	123 r	112 r	87	85 r
Apr	81.4 r	105 r	114 r	83	85
May	78.0 r	101 r	105 r	88 r	96 r
Jun	86.2 p	111 p	120 p	91 p	102 p
Averages					
Jan-Mar 79			106		90
Apr-Jun 1979			113		92
Percentage change			+6.1		+2.1
Apr-Jun 78			112		81
Apr-Jun 79			113		92
Percentage change			+0.6		+12.4

r Revised. p Provisional.

Carpet industry sales in May

The daily rate of carpet manufacturers' sales by value in May 1979 at current prices was provisionally estimated to have been 6 per cent more than in May 1978 assuming 21 working days in both periods. In the three months ended May 1979 the daily rate of manufacturers' sales was provisionally estimated to have been 8 per cent more than in the corresponding period 12 months ago assuming 62 working days in both periods. The index numbers which are of manufacturers' sales by value, have been adjusted for the length of the working month, but not for non-statutory holidays or other seasonal factors. The wholesale price index of carpets is shown as a guide to the movement in prices.

Inquiries: Department of Industry, Room 524, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 0017.

Index of carpet manufacturers' sales 1975 = 100

	Index of manufacturers' sales at current prices	Wholesale price index
1974	89	86.7
1975	100	100.0
1976	114	115.7
1977	127	134.7
1978	142	149.7
1978		
1st qtr	134	145.8
2nd	139	147.0
3rd	135	151.7
4th	159	154.3
1979		
1st qtr	135	159.0
1978		
February	133	146.6
March	143	146.6
April	142	146.8
May	139	146.8
1979		
February	155	160.1
March	161	160.2
April	152	161.0
May	147	161.9

Government borrowing up in April to July

It is provisionally estimated that the central government borrowing requirement for the four months April to July 1979 was £3,879 million compared with £2,516 million in the same period in 1978. For the month of July 1979 central government has borrowed an estimated £46 million; in July 1978 £143 million was repaid.

Britons eat more meat, potatoes . . . and fruit

Going . . . going . . . nearly gone.

In 1978 there were increases in consumption of meat, oils and fats, fruit and potatoes and decreases in consumption of dairy products, pulses and nuts and some grain products. These offsetting changes produced a slight increase in the energy equivalent of the diet from 12240 kJ (2920 kcal) in 1977 to 12270 kJ (2930 kcal) in 1978. An additional 17 kJ (4 kcal) was provided by increased consumption of spirits and beer.

Preliminary estimates of food supplies moving into consumption in the United Kingdom in 1978 are set out in the table and compared with the results for 1977.

Supplies of dairy products (converted to milk solids) fell from 24.8 kg per head in 1977 to 24.3 kg per head in 1978. Supplies of liquid milk fell by 1.9 litres to 133.4 litres per head although within this figure supplies of school and welfare milk increased slightly. Supplies of cream, cheese and yoghurt showed slight increases.

Supplies of meat (in terms of edible weight) rose by 1.7 kg to 57.9 kg per head in 1978. Consumption of beef and veal rose by 0.9 kg per head and poultry by 0.4 kg per head, while consumption of mutton and lamb was slightly lower, from 7.0 kg per head in 1977 to 6.9 kg per head in 1978.

Consumption of fresh, frozen and cured fish rose by 0.1 kg (wet fillet equivalent) to 5.8 kg per head but this was more than offset by a reduction of 0.2 kg in canned fish supplies.

The total supply of eggs remained constant at 248 per head per year. Total supplies of oils and fats (visible) increased by 0.2 kg to 22.6 kg per head. Visible fats exclude the fat content of other foods included elsewhere, for example meat and fish. There was a slight fall in supplies of butter (0.1 kg per head) and lard and compound cooking fat (0.3 kg per head) while supplies of other edible oils and fats rose slightly. Supplies of margarine (net) rose appreciably from 5.4 kg per head per annum to 5.9 kg per head.

There was little change in supplies of sugar

Food supplies per head per annum moving into consumption in the United Kingdom

(kg per head per annum)

	1977 Revised	1978 Provisional
Dairy products (excluding butter)		
Liquid milk	139.2	137.0
(litres per head per annum)	(135.3)	(133.4)
of which school and welfare milk (litres)	(3.3)	(3.6)
Cream (40 per cent fat content)	1.5	1.6
Cheese	5.5	5.7
Evaporated milk, full cream, unsweetened	1.5	1.7
Condensed milk, full cream, sweetened	0.2	0.2
Condensed milk, machine skimmed	0.8	0.8
Dried whole milk	0.2	0.1
Dried skimmed milk	1.5	1.1
Yoghurt	1.8	1.9
Milk as liquid in manufactured products not elsewhere specified	5.6	5.0
Total (converted to milk solids)	24.8	24.3
Meat		
Beef – bone in	18.7	19.5
Beef – bone out (expressed as bone-in equivalent) [1]	2.4	2.5
Mutton and lamb	7.0	6.9
Pork	11.5	11.7
Offal	3.9	4.0
Imported meat products	3.9	3.9
Bacon and ham	8.9	9.2
Poultry	12.1	12.5
Game and rabbits	0.1	0.1
Total (converted to edible weight)	56.2	57.9
Fish		
Fresh, frozen and cured (wet fillet equivalent)	5.7	5.8
Shell fish, fresh and frozen (edible weight)	0.5	0.5
Canned fish (imported)	1.2	1.0
Total (edible weight)	7.4	7.3
Eggs		
Shell eggs (number)	236	236
Egg products (equivalent number of eggs)	12	12
	248	248
Oils and fats (visible)		
Butter	7.8	7.7
Margarine (gross)	6.5	6.3
(net) [2]	5.4	5.9
Lard and compound cooking fat	6.2	5.9
Other edible oils and fats	5.5	5.6
Total (converted to fat content)	22.4	22.6
Sugar and syrups		
Sugar refined [3]		
1 (gross)	41.9	42.1
2	39.7	39.9
3 (net)	38.6	38.8
Honey	0.4	0.3
Glucose	8.9	8.9
Total (sugar content) (gross)	49.9	50.0
(net)	46.6	46.7
Fruit		
Fresh citrus fruit	8.8	9.3
Other fresh fruit	22.1	22.1
Canned fruit	6.0	5.8
Imported fruit juices (in natural strength)	3.7	3.7
Imported fruit pulp	1.1	1.1
Imported dried fruit	2.2	2.2
Total (converted to fresh equivalent)	52.8	53.1
Pulses and nuts		
Dried pulses [4]	3.0	2.9
Shelled nuts and soya flour	2.7	2.6
Total	5.7	5.5
Potatoes and potato products		
Potatoes	71.1	80.8
Potato products (Raw equivalent)		
Crisps	7.0	7.3
Frozen and par-fries	7.5	7.5
Canned and dehydrated	8.0	5.3
Pre-peeled	2.1	2.1
Total (raw equivalent)	95.7	103.0
Other vegetables		
Fresh tomatoes	5.7	5.7
Imported canned tomatoes (including juice and puree)	4.4	3.2
Cabbage and greens	15.7	16.4
Leafy salads	2.1	2.1
Fresh carrots	6.1	7.1
Fresh legumes	11.8	11.5
Other fresh vegetables	15.9	16.2
Other canned vegetables [5]	4.0	4.0
Total (converted to fresh equivalent)	68.2	68.2
Grain products		
Wheat flour	65.3	64.6
Barley products	0.1	0.1
Oat products	1.4	1.4
Rye products	0.1	0.1
Breakfast cereals	3.9	3.6
Rice	2.1	2.0
Starch and other farinaceous foods	1.0	1.0
Total	74.0	72.8
Tea, coffee and cocoa		
Tea	3.2	2.8
Coffee (bean equivalent) [6]	1.7	1.9
Cocoa powder	0.2	0.1
Alcoholic drink [7]		
Spirits (proof litres) [8]	2.5	2.9
Beer (litres)	117.8	119.1
Wine (litres)	6.4	5.9
Energy value (per head per day)		
Food (including coffee and cocoa) kJ (kcal)[9]	12 240 (2 920)	12 270 (2 930)
Alcoholic drink kJ (kcal)[9]	670 (160)	687 (164)
Nutrient content (g per head per day)		
Protein		
Animal	51.0	51.6
Vegetable	31.9	31.9
Total	82.9	83.5
Fat from all sources		
Animal	103	104
Vegetable	27	25
Total	130	129
Carbohydrate [10]		
Animal	23	25
Vegetable	356	359
Total	379	384
Population (millions)	55.91	55.88

Note 1 kg = 2.2 lb. [1] To convert from product weight to bone-in equivalent a factor of × 1.30 is used. [2] Excluding ingredients shown as separate items elsewhere in the tables (eg butter and lard). [3] Total consumption of sugar including sugar content of imported manufactured foods. [4] Includes dried beans and dried peas for canning. [5] Excludes canned dried peas, canned dried beans (beans in tomato sauce, etc) and canned tomatoes. [6] Including coffee extracts and essences. [7] Quantities retained for home use, based on information provided by HM Customs and Excise. [8] Excludes medical spirit. [9] 1000 kilocalories (kcal) = 4184 kilojoules (kJ). [10] Available carbohydrate expressed as monosaccharides.

and syrups, the net total (sugar content) increasing by 0.1 kg to 46.7 kg per head. Consumption of fruit increased by 0.3 kg to 53.1 kg per head in 1978; within the group fresh citrus fruit supplies increased by 0.5 kg to 9.3 kg per head, whilst supplies of canned fruit decreased.

Consumption of dried pulses and shelled nuts and soya flour each decreased by 0.1 kg per head to leave the total for pulses and nuts 0.2 kg down on 1977 at 5.5 kg per head.

Supplies of potatoes and potato products increased by 7.3 kg to 103 kg per head. This was due mainly to an increase of 13 per cent in supplies of fresh potatoes reaching 80.8 kg per head; of the products (raw equivalent) only consumption of crisps increased (by 0.3 kg per head to 7.3 kg); supplies of canned and dehydrated potatoes fell by 34 per cent to 5.3 kg per head.

The total for other vegetables (fresh equivalent) remained constant at 68.2 kg per head, but within the group consumption of imported canned tomatoes (including juice and purée) and fresh legumes fell, whilst supplies of fresh carrots, other fresh vegetables and cabbage and greens all increased.

Total supplies of grain products fell by 1.2 kg per head per annum, to 72.8 kg per head in 1978. There were no increases in individual grain products; consumption of wheat flour fell by 0.7 kg (to 64.6 kg per head) and breakfast cereals fell by 0.3 kg (to 3.6 kg per head).

Tea and cocoa powder consumption declined in 1978, tea by 0.4 kg to 2.8 kg per head. Coffee supplies increased from 1.7 kg per head in 1977 to 1.9 kg per head in 1978.

Consumption of spirits rose by 0.4 proof litres to 2.9 proof litres per head and beer consumption increased by 1.3 litres to 119.1 litres per head but wine supplies fell by 0.5 litre to 5.9 litres per head.

In terms of energy value, food supplies for 1978 provided 12 270 kJ (equivalent to 2930 kcal), a small increase of 30 kJ (10 kcal) over 1977 levels. This was almost entirely attributable to increased supplies of meat. Measured in terms of protein equivalent, supplies increased by less than 1 per cent; all of which was in animal protein. There was a slight decrease of 1 g (about 1 per cent) in total fats, with the increase in animal fats being more than offset by a reduction in vegetable fats. Supplies of carbohydrates rose by 5 g (just over 1 per cent), reaching 384 g per head per day.

Notes

Estimates are national averages and represent not what a particular individual obtains but what, on average, is available to the population as a whole. More detailed figures, with estimates of consumption of end-products, a full commentary on the results, and some nutritional analyses, will be published later in the year.

Figures for the years 1974 to 1977 were published in *Trade and Industry*, 29 September 1978, pages 746-8.

The figures in the table relate to commodities at a primary stage of distribution and represent supplies of food from all sources (home production plus imports) becoming available for consumption during the year. To arrive at the total moving into human consumption in the United Kingdom, deductions are made for exports, waste and non-food uses, and account is taken of changes in measured stocks. While little information is available on changes in wholesalers' and retailers' stocks, this may affect year-to-year comparisons of non-perishable foodstuffs. The resulting totals are then divided by the mid-year population to give average consumption per head.

The energy and nutrient conversion factors are the same as those used for 1977.

Inquiries: Ministry of Agriculture, Fisheries and Food, Statistics Division 2A, Whitehall Place, London SW1A 2HH, tel. 01-839 7711 ext. 479.

Patents recorded 'licences of right'

Under section 46 of the Patents Act 1977 the register was noted 'licences of right' in respect of the following patents on the date specified:

9 July 1979

1374408 Matsushita Electric Industrial Co Ltd
Signal generators
1389071 Matsushita Electric Industrial Co Ltd
Improvements in and relating to electrical channel selecting devices
1397780 Matsushita Electric Industrial Co Ltd
Improvements in and relating to electrical control systems
1401030 Matsushita Electric Industrial Co Ltd
Improvements in and relating to mechanical-coupling arrangements for coupling variable electrical resistors
1406048 Matsushita Electric Industrial Co Ltd
Improvements in and relating to liquid fuel burners
1409798 Matsushita Electric Industrial Co Ltd
Improvements in and relating to frequency control arrangements
1412016 Matsushita Electric Industrial Co Ltd
Improvements in and relating to electrical control circuits
1413389 Matsushita Electric Industrial Co Ltd
Mos type semi-conductor IC device
1415319 Matsushita Electric Industrial Co Ltd
Improvements in and relating to variable resistors
1415320 Matsushita Electric Industrial Co Ltd
Improvements in and relating to variable resistors
1416447 Matsushita Electric Industrial Co Ltd
Improvements in and relating to channel selector switching arrangements
1416456 Matsushita Electric Industrial Co Ltd
Improvements in and relating to signal processing arrangements
1416554 Matsushita Electric Industrial Co Ltd
Improvements in and relating to remote control systems
1431356 Matsushita Electric Industrial Co Ltd
Pickup cartridge
1435224 Matsushita Electric Industrial Co Ltd
Improvements in and relating to juice extracting and blending apparatus
1439167 Matsushita Electric Industrial Co Ltd
Remote control system
1439379 Matsushita Electric Industrial Co Ltd
Improvements in and relating to image communications systems
1441951 Matsushita Electric Industrial Co Ltd
Improvements in and relating to ultrasonic generators
1442502 Matsushita Electric Industrial Co Ltd
Liquid crystal display
1444591 Matsushita Electric Industrial Co Ltd
Photoelectric image display device

12 July 1979

1123389 Matsushita Electronics Corporation
A solid state microwave oscillating device
1127166 Matsushita Electronics Corporation
Process for preparing phosphors
1141918 Matsushita Electronics Corporation
A microwave oscillating semiconductor device
1171578 Matsushita Electronics Corporation
Halogen bulb
1172937 Matsushita Electronics Corporation
Electric refrigerator or like apparatus
1173583 Matsushita Electronics Corporation
A method of reclaiming rare earth fluorescent substances
1182540 Matsushita Electronics Corporation
Method of making a semi-conductor device
1188694 Matsushita Electronics Corporation
Method of making a semi-conductor device
1188954 Matsushita Electronics Corporation
Fluorescent film for colour television picture tube and process of preparing same
1194760 Matsushita Electronics Corporation
Defrosting controller for electric refrigerator
1225855 Matsushita Electronics Corporation
Natural air-cooled type magnetron device
1246026 Matsushita Electronics Corporation
Method of manufacturing a semiconductor device
1258580 Matsushita Electronics Corporation
Semiconductor device and its manufacturing method
1266398 Matsushita Electronics Corporation
Semiconductor structure and method of manufacturing same
1278088 Matsushita Electronics Corporation
Apparatus for generating microwaves
1280047 Matsushita Electronics Corporation
Integrated signal converter circuit
1281409 Matsushita Electronics Corporation Co Ltd
Solid-state microwave generating device
1289534 Matsushita Electronics Corporation Co Ltd
Glow discharge tube for code display
1312299 Matsushita Electronics Corporation Co Ltd
Insulated gate semiconductor device
1316539 Matsushita Electronics Corporation Co Ltd
Character generating cathode ray tube device
1317079 Matsushita Electronics Corporation Co Ltd
Character generating cathode ray tube device
1320278 Matsushita Electronics Corporation Co Ltd
High pressure metal vapour discharge lamp
1331028 Matsushita Electronics Corporation Co Ltd
Improvements in and relating to a method of soldering a semiconductor plate
1337206 Matsushita Electronics Corporation Co Ltd
Silicon target for image pickup tube
1340589 Matsushita Electronics Corporation Co Ltd
A method for producing phosphor screen
1350039 Matsushita Electronics Corporation Co Ltd
Improvements in and relating to a fluorescent lamp
1370049 Matsushita Electronics Corporation Co Ltd
Color image pick-up tube
1371836 Matsushita Electronics Corporation Co Ltd
Improvements in and relating to base for annular lamp
1379330 Matsushita Electronics Corporation Co Ltd
An apparatus for producing fluorescent lamps
1391640 Matsushita Electronics Corporation Co Ltd
Improvements in and relating to a semiconductor memory device
1431313 Matsushita Electronics Corporation Co Ltd
Character display-discharge tube
1379964 Matsushita Electric Industrial Co Ltd
Improvements in or relating to fastener feeding apparatus
1386451 Matsushita Electric Industrial
Improvements in or relating to component mounting apparatus
1387546 Matsushita Electric Industrial
Fluid pressure operated fastener feeding and driving apparatus
1399511 Matsushita Electric Industrial
Improvements in or relating to Quadraphonic devices
1416966 Matsushita Electric Industrial
Recording and reproducing system for a telephone monitoring system
1435986 Matsushita Electric Industrial
Parts supply apparatus
1387981 Standard Telephones and Cables Ltd
Optical communication system
1423449 Standard Telephones and Cables Ltd
Semiconductor device
1490072 Standard Telephones and Cables Ltd
Radio navigation equipment
1499327 Standard Telephones and Cables Ltd
Radio navigation beacon
1285223 Telefunken Patentverwertungsgesellschaft MBH
Communication transmission system comprising broadband transmission channels, with a plurality subscribers
1428128 Torbjorn Grenness
Solutions of thermoplastic blockcopolymers
1501949 Ateliers J. Hanrez Societe Anonyme
Boiler

16 July 1979

1078820 Matsushita Electric Industrial Co Ltd
Method of manufacturing film resistors
1135270 Matsushita Electric Industrial Co Ltd
Extensible and contractible flexible plastics hose
1158551 Matsushita Electric Industrial Co Ltd
Electrolytic process for preparing mercuric oxide
1164924 Matsushita Electric Industrial Co Ltd
Traffic flow detecting apparatus
1196682 Matsushita Electric Industrial Co Ltd
Solid state oscillator element
1197304 Matsushita Electric Industrial Co Ltd
Battery
1215652 Matsushita Electric Industrial Co Ltd
Electric vacuum cleaners
1219854 Matsushita Electric Industrial Co Ltd
Piezolectric high voltage generating device
1224686 Matsushita Electric Industrial Co Ltd
Dry cells
1242451 Matsushita Electric Industrial Co Ltd
Television and facsimile multiplex systems
1247400 Matsushita Electric Industrial Co Ltd
Method and apparatus for molding thermoplastic materials
1268417 Matsushita Electric Industrial Co Ltd
Ventilator
1274101 Matsushita Electric Industrial Co Ltd
Dry cells
1276522 Matsushita Electric Industrial Co Ltd
Discharge lamp lighting apparatus
1277164 Matsushita Electric Industrial Co Ltd
Overcurrent protector
1277240 Matsushita Electric Industrial Co Ltd
Color television pick-up device
1277730 Matsushita Electric Industrial Co Ltd
Liquid fuel burner
1309114 Matsushita Electric Industrial Co Ltd
Automatic player for tape cassettes
1310408 Matsushita Electric Industrial Co Ltd
Exercising device
1310979 Matsushita Electric Industrial Co Ltd
Electrolytic method of making a nickel positive electrode for an alkaline battery
1322552 Matsushita Electric Industrial Co Ltd
Mail processing apparatus
1323751 Matsushita Electric Industrial Co Ltd
Method of controlling arc welding
1332950 Matsushita Electric Industrial Co Ltd
Steam iron
1355685 Matsushita Electric Industrial Co Ltd
Vehicle exhaust – purification equipment
1359041 Matsushita Electric Industrial Co Ltd
Signal processing system
1361827 Matsushita Electric Industrial Co Ltd
Filter medium for water treatment
1362534 Matsushita Electric Industrial Co Ltd
Hot water heating system
1365916 Matsushita Electric Industrial Co Ltd
Process for preparing catalyst for exhaust gas purification

1369288 Matsushita Electric Industrial Co Ltd
Television receiver
1386884 Matsushita Electric Industrial Co Ltd
Character display system
1397904 Matsushita Electric Industrial Co Ltd
Plastic fasteners
1401149 Matsushita Electric Industrial Co Ltd
Waveform generator
1402879 Matsushita Electric Industrial Co Ltd
High voltage generating device
1403576 Matsushita Electric Industrial Co Ltd
A photographic camera with developing means
1405141 Matsushita Electric Industrial Co Ltd
Apparatus for displaying a computing function
1412560 Matsushita Electric Industrial Co Ltd
Pal system colour television signal recording and producing system
1418323 Matsushita Electric Industrial Co Ltd
Catalyst for purifying exhaust gas
1418969 Matsushita Electric Industrial Co Ltd
Method of making integrated circuits
1422206 Matsushita Electric Industrial Co Ltd
Magnetic recording and reproducing system
1434997 Matsushita Electric Industrial Co Ltd
Terbium – activated phosphor and method for making same
1197772 Matsushita Electronics Corporation
Improvements in or relating to photo-sensitive slurries and their preparation
1212926 Matsushita Electronics Corporation
Imrpovements in or relating to microwave oscillating devices
1246739 Matsushita Electronics Corporation
Improvements in or relating to methods of making Germanium semiconductor devices
1254080 Matsushita Electronics Corporation
Improvements in or relating to microwave oscillators
1265017 Matsushita Electronics Corporation
Improvements in or relating to semiconductor devices
1265018 Matsushita Electronics Corporation
Improvements in or relating to pressure-sensitive semiconductor devices
1460211 The Post Office
Improvements in or relating to dielectric optical waveguides
1470890 The Post Office
Improvements in or relating to cables
1478498 The Post Office
Improvements in or relating to joining metal surfaces
1514477 The Post Office
Improvements in or relating to optical devices
1170724 Societe Anonyme Automobiles Citroen
Motor vehicle suspension system
1347605 Societe Anonyme Automobiles Citroen
Improvements in or relating to pressurised – fluid control assemblies
1391417 W. H Bramall and Co Ltd
Gauge for use with a pressure vessel
1392999 Nibaldo Moscatti
Apparatus for playing a game
1440824 Bayerische Motoren Werke Aktiengesellschaft
A coupling having an electrical connector for bridging a flexible electrically insulating coupling member, such as the coupling plate in the divided steering shaft of a motor vehicle
1450048 Valli Adam Hafezi
Shaving devices
1524027 Agfa-Gevaert
Colour radiographic silver halide process
1530340 F. I. P. Formatura Iniezione Polimeri SPA
Method of forming a compound clamping ring and a compound clamping ring so obtained
1540106 Olle Tornas
A shotgun and a device for a shotgun
1541049 Sprague Electric Co
Solid electrolytic capacitor

Any person who claims that the proprietor of the patent is, and was at the time of entry, precluded by a contract in which the claimant is interested from granting licences under the patent may, within three months after the making of the relevant entry, apply to the Comptroller on patents form 31/77 for cancellation of the entry.

I. J. G. Davis, Comptroller

Proceedings under section 36 of the Patents Act 1949

Notice is hereby given that the endorsement 'licences of right' upon the undermentioned patent was cancelled on 25 June 1979.

1294147 Ali Bindernagel
Improvements in or relating to castings of metals

Business Monitors

The following titles and issues of Business Monitors are now available:

PRODUCTION SERIES
Quarterly at £1.95 each per year post free

PQ 239.1	Spirit distilling and compounding for first qtr 1979
PQ 278	Fertilisers for first qtr 1979
PQ 279.1	Polishes for first qtr 1979
PQ 279.2	Formulated adhesives, gelatine, etc for first qtr 1979
PQ 339.1	Mining machinery for first qtr 1979
PQ 353	Surgical instruments and appliances for first qtr 1979
PQ 366	Electronic computers for first qtr 1979
PQ 368	Electric appliances primarily for domestic use for first qtr 1979
PQ 391	Hand tools and implements for first qtr 1979
PQ 394	Wine and wine manufacturers for first qtr 1979
PQ 396.2	Jewellery for first qtr 1979
PQ 399.1	Metal furniture for first qtr 1979
PQ 399.2	Metal windows and door frames for first qtr 1979
PQ 399.3	Safes, locks, latches, keys and springs for first qtr 1979
PQ 399.9	Domestic gas appliances for first qtr 1979
PQ 421	Narrow fabrics for first qtr 1979
PQ 429.1	Asbestos for first qtr 1979
PQ 429.2	Miscellaneous textile industries for first qtr 1979
PQ 431	Leather (tanning and dressings) and fellmongery for first qtr 1979
PQ 443	Women's and girls' tailored outerwear for fourth qtr 1978
PQ 461.2	Clay building bricks and other non-refractory goods for first qtr 1979
PQ 601	Gas for first qtr 1979
PQ 1002	Manufacturing industries (total sales) for first qtr 1979

MISCELLANEOUS SERIES
Monthly at £5.40 each per year post free

MM1	Motor vehicles registration for May 1979

1976 Report of the Census of Production (price including postage, shown in brackets)

PA 101	Coal mining (67p)
PA 104	Petroleum and natural gas (52p)
PA 229.1	Margarine (67p)
PA 240	Tobacco (67p)
PA 271.1	Inorganic chemicals (67p)
PA 271.3	Miscellaneous general chemicals (67p)
PA 273	Toilet preparations (67p)
PA 277	Dyestuffs and pigments (67p)
PA 279.3	Explosives and fireworks (67p)
PA 279.6	Surgical bandages, etc (67p)
PA 312	Steel tubes (67p)
PA 311	Iron and steel (general) (67p)
PA 322	Copper, brass and other copper alloys (67p)
PA 332	Metal working machine tools (67p)
PA 333.2	Valves (92p)
PA 336	Construction and earthmoving equipment (67p)
PA 337	Mechanical handling equipment (67p)
PA 339.2	Printing, bookbinding and paper goods machinery (67p)
PA 349.1	Ball, roller, plain and other bearings (67p)
PA 366	Electronic computers (67p)
PA 368	Electrical appliances primarily for domestic use (67p)
PA 369.2	Primary and secondary batteries (67p)
PA 381.2	Trailers, caravans and freight containers (67p)
PA 399.1	Metal furniture (67p)
PA 399.5	Drop forgings etc (67p)
PA 411	Production of man-made fibres (67p)
PA 415	Jute (92p)
PA 433	Fur (67p)
PA 443	Women's and girls' tailored outerwear (67p)
PA 464	Cement (67p)
PA 472	Furniture and upholstery (67p)
PA 482.2	Packaging products of paper and associated materials (67p)
PA 484.1	Wall coverings (67p)
PA 491	Lineoleum, plastics floor-coverings, leathercloth, etc (67p)
PA 601	Gas (67p)

Amendment to *Trade and Industry*, 13 July 1979, page 95
The price of the MQ10 monitor should read £1.95p a year not '£1.95 per quarter'.

Insurance Companies Act 1974: authorisations and revocations

Under the powers conferred on him by section 3(1) (a) of the Insurance Companies Act 1974 the Secretary of State for Trade has accepted that the companies listed below were carrying on the classes of insurance business shown in the table immediately before 3 November 1966 and are accordingly authorised to carry on those classes of business

Name of insurer and registered office or address in Great Britain	Country of incorporation if outside GB	Date of acceptance	Class or classes of insurance business for which authorisation was accepted
The Omega Insurance Company Ltd, Expedier House, Farnham, Surrey GU9 7PY	—	31.7.79	16
The Veterinary Defence and Benevolent Society 1 Simmons Street, Blackburn, Lancashire BB21AX	—	17.7.79	16, 17

The following authorisations to carry on insurance business in Great Britain were issued by the Secretary of State for Trade under section 3(1) (b) of the Insurance Companies Act 1974 during the period 1 July to 31 July 1979.

Name of insurer and registered office or address in Great Britain	Country of incorporation if outside GB	Date of authorisation	Class or classes of insurance business for which authorisation was issued
Chain Insurance Company Ltd PO Box 155 St Vincent Street, Glasgow G2 5PA	—	19.7.79	16
City Insurance Company (UK) Ltd The Bowring Building Tower Place, London EC3P 3BE	—	24.7.79	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17

The following authorisations to carry on insurance business in Great Britain were revoked by the Secretary of State for Trade under section 9 of the Insurance Companies Act 1974 during the period 1 July to 31 July 1979.

Name of insurer and registered office or address in Great Britain	Country of incorporation if outside GB	Date of revocation	Class or classes of insurance business for which authorisation was revoked
Diversion Insurance (Timber) Association Ltd Clareville House, Whitcomb Street, London WC2H 7DL	—	31.7.79	11, 12, 14, 15
Medical Sickness Annuity and Life Assurance Society Ltd, 7/10 Chandos Street, Cavendish Square, London W1A 2LN	—	19.7.79	1, 2

Classes of business

OLT	Ordinary long-term insurance business
IND	Industrial assurance business
1	Accident insurance business
2	Sickness insurance business
3	Land vehicles insurance business
4	Railway rolling stock insurance business
5	Aircraft insurance business
6	Ships insurance business
7	Goods in transit insurance business
8	Fire and natural forces insurance business
9	Damage to property insurance business
10	Motor vehicle liability insurance business
11	Aircraft liability insurance business
12	Liability for ships insurance business
13	General liability insurance business
14	Credit insurance business
15	Suretyship insurance business
16	Miscellaneous financial loss insurance business
17	Legal expenses insurance business

Wholesale price indices in July

Output prices

The price index for the home sales of manufactured products increased by 2¼ per cent between June and July to 174.5 (1975=100). The change in this index measured over a 12-month period rose from 11¾ per cent in June to 13½ per cent in July. The six-monthly change rose in July, for the eighth consecutive month, to 9 per cent.

The index for manufactured products other than food, drink and tobacco rose by 2½ per cent between June and July to 174.5. Further higher prices for petroleum products accounted for just over one half of the increase. The index rose 6 per cent over the latest three months.

Amongst the individual sector indices which are published in Table 2 the largest monthly increases were in the steel and the pottery and glass industries (2¾ per cent): the smallest increase occurred in the vehicles industry index which recorded a ½ per cent increase. However this latter index showed the highest increase over the latest three months with a rise of 4½ per cent.

Higher prices for steel products accounted for all of the 2¾ per cent increase in the index for the steel industries and for most of the 1¼ per cent increase in the index for the metal manufacturing industries. The most significant contributors were steel sheet, girders, beams, joists and columns.

Almost half of the 2¾ per cent increase in the index for the pottery and glass industries was accounted for by increased prices for flat glass.

Higher prices for upholstered furniture, wooden furniture and bedding and soft furnishings accounted for about three-quarters of the 2¼ per cent increase in the index for the timber industries. This index increased by 4½ per cent over the last three months.

Just over a half of 1¾ per cent increase in the index for the instrument engineering industries was accounted for by increased prices for process measuring and control instruments and for surgical, dental and veterinary instruments and appliances.

Higher prices for carpets and rugs and hosiery and other knitted goods made the most significant contributions to the 1½ per cent increase in the index for the textiles industry. The index for the clothing and footwear industry showed a similar increase; higher prices for women's and girls' lingerie made the most significant contribution.

The index for the food manufacturing industries increased by 1 per cent between June and July to 180.4. Higher prices for bacon curing, meat and fish products and milk and milk products made the most significant contributions to the increase. This index increased by 4¾ per cent over the latest three months.

Input prices

The price index for materials and fuel purchased by manufacturing industry remained virtually unchanged between June and July at 164.7 (1975=100). This lack of change is, however, from a revised June figure which is 1½

Table 1 Price index numbers of materials and fuel purchased

1975 = 100

1968 SIC Orders or MLH numbers		1978 2nd qtr	1978 3rd qtr	1978 4th qtr	1979 1st qtr	1979 2nd qtr p	1978 Jul	1978 Dec	1979 Jan	1979 Feb	1979 Mar	1979 Apr	1979 May	1979 Jun p	1979 Jul p
Orders III to XIX	Materials and fuel purchased by manufacturing industry:	146.3	144.9	147.1	152.2	161.3	145.8	148.3	150.8	152.2	153.5	158.4	161.0	164.5	164.7
	Materials [1]	145.5	143.8	146.2	151.7	160.7	144.8	147.5	150.3	151.8	152.9	157.7	160.3	164.1	163.9
	Coal (except for carbonising), gas and electricity	152.9	152.8	153.0	154.1	164.5	152.9	153.1	153.1	153.0	156.2	162.2	164.9	166.3	169.4
Orders IV to XIX	Materials and fuel purchased by manufacturing industry, other than food, drink and tobacco manufacturing industries	141.5	139.2	140.9	146.6	158.6	139.7	141.3	144.6	146.9	148.4	155.3	158.3	162.3	163.0
	Materials [1]	139.3	136.6	138.6	145.1	157.4	137.2	139.1	142.9	145.7	146.8	153.9	157.0	161.4	161.6
Order III	Materials and fuel purchased by the food, drink and tobacco manufacturing industries	155.2	156.4	159.1	163.0	167.3	157.6	161.2	162.6	162.6	163.7	165.1	167.2	169.6	169.7
	Materials and fuel purchased by selected broad sectors of industry														
211 to 229	Food manufacturing industries	157.0	157.2	160.8	164.2	168.1	158.8	163.1	164.4	163.7	164.6	165.8	167.6	170.9	171.8
	Materials	157.0	157.3	161.0	164.5	167.9	159.0	163.4	164.7	163.9	164.8	165.7	167.5	170.6	171.2
	Fuel [2]	155.9	155.9	156.0	158.4	171.7	155.9	156.1	156.1	158.4	160.7	166.2	170.6	178.2	188.5
211 to 229 (excluding MLH 219)	Food manufacturing industries (excluding animal and poultry foods)	156.2	157.5	161.1	164.0	168.0	158.6	163.4	164.5	163.5	164.1	165.4	167.2	171.5	173.0
Order V	Chemicals and allied industries	153.4	153.2	155.3	161.3	171.9	153.2	155.7	157.8	162.0	164.0	167.2	171.6	176.8	183.1
311 and 312	Steel industries	145.7	146.7	148.8	153.2	160.3	146.0	149.4	150.7	152.4	156.5	158.4	160.0	162.6	165.9
321 to 323	Non-ferrous metals industry	142.3	146.7	155.6	171.4	178.2	143.0	156.6	161.5	173.7	179.1	179.4	177.8	177.5	168.9
Order VII (excluding MLH 342)	Mechanical engineering industries	152.5	155.8	159.3	162.9	168.6	154.3	160.0	161.1	163.2	164.4	167.6	168.7	169.6	171.8
Order IX	Electrical engineering industries	148.3	151.2	155.2	163.5	171.2	149.6	156.2	159.2	164.0	167.3	170.7	171.2	171.7	173.2
Order X	Shipbuilding and marine engineering industries	148.4	151.3	154.5	158.7	163.8	150.3	155.3	157.3	158.8	160.0	162.5	163.9	165.2	167.4
Order XII	Metal goods industries	152.6	155.5	159.1	163.9	170.5	154.0	159.7	161.3	164.3	166.0	162.4	170.9	172.0	174.5
Order XIII	Textile industries	145.4	146.1	149.6	154.3	162.4	145.5	150.9	152.1	154.2	156.6	160.4	163.0	163.8	165.6
Order XV	Clothing and footwear industries	142.3	144.9	148.4	154.0	162.3	144.2	149.4	152.4	153.0	156.5	160.0 p	162.8 p	164.2	166.6
461, 464 and 469	Bricks, cement etc, industries	152.9	154.5	157.2	163.1	173.4	154.1	158.0	160.3	163.0	166.0	169.9	173.9	176.5	182.6
462 and 463	Pottery and glass industries	158.6	160.2	163.3	167.2	177.5	159.8	163.7	165.2	167.4	168.9	173.8	177.5	181.3	186.4
Order XVII	Timber industries	147.0	150.7	153.4	159.0	167.5	149.4	154.2	156.3	158.6	162.2	165.8	167.5	169.2	171.8
481 to 484	Paper industries	120.6	120.2	124.8	129.6	135.6	120.8	125.0	128.8	129.6	130.3	134.4	136.3	136.0	134.6
Order XX	Construction materials	156.6	159.7	162.9	168.7	177.3	158.7	163.8	166.4	168.4	171.3	174.2	177.4	180.3	183.8
Part of Order XX	House building materials	156.2	159.8	163.0	168.6	177.1	158.7	164.1	166.4	168.4	170.9	173.9	177.1	180.2	183.5

[1] Includes crude oil and coal for carbonising. [2] Includes petroleum products. p Provisional.

Table 1a Price index numbers of materials and fuel purchased by selected sectors of industry

1975 = 100

1968 SIC		1978 2nd qtr	1978 3rd qtr	1978 4th qtr	1979 1st qtr	1979 2nd qtr p	1978 Jul	1978 Dec	1979 Jan	1979 Feb	1979 Mar	1979 Apr	1979 May	1979 Jun p	1979 Jul p
361	Electrical machinery industry	149.4	152.5	155.6	161.8	167.8	151.3	156.6	159.4	162.0	164.0	166.9	167.9	168.6	171.5
362	Insulated wires and cables industry	142.8	145.3	149.7	164.2	173.0	143.4	151.6	156.2	164.9	171.5	176.1	172.8	170.0	168.1
364	Radio and electronic components industry	148.5	151.5	155.3	161.4	169.9	149.9	155.8	158.5	161.8	164.0	167.6	170.2	171.9	173.5
368	Domestic appliances industry	152.1	155.4	158.6	162.8	169.4	154.0	159.2	160.9	162.9	164.5	167.5	169.4	171.2	174.4
369	Electrical goods industries n.e.s.	149.7	153.0	157.3	163.7	171.4	151.4	158.1	160.7	164.0	166.4	169.8	171.5	172.8	173.9
381	Motor vehicle industry	152.6	156.1	159.1	163.1	168.8	154.8	159.7	161.0	163.5	164.8	167.7	168.7	170.1	173.0
411	Man-made fibres industry	137.1	137.4	140.8	146.5	159.9	136.9	141.1	144.2	146.1	149.1	157.5	160.6	161.6	163.9
414	Woollen and worsted industry	150.5	154.3	158.0	165.9	164.3	155.1	163.2	163.7	166.3	167.6	166.6	165.2	161.0	162.2
422/1	Household textiles and handkerchiefs industry	143.7	146.5	149.6	153.3	160.0	145.7	150.3	151.8	153.0	155.0	158.0	160.4	161.5	163.6
450	Footwear industry	139.3	142.2	148.9	158.2	173.7	141.4	150.9	155.3	156.2	163.2	169.1 p	174.4 p	177.6	180.6
481	Paper and board making industry	118.5	118.0	123.1	127.3	132.0	118.6	123.2	127.0	127.4	127.5	130.7	132.6	132.6	131.2

p Provisional.

per cent higher than the provisional index published last month. The first estimates for June for the input indices have been revised to take account of some of the Opec price increases agreed at the end of June being backdated to 1 June. The change in this index measured over a 12-month period rose from 12 per cent in June (on revised figures) to 13 per cent in July. Over the last six months this index has increased by 9¼ per cent.

The 1¾ per cent increase to 169.4 in the index for coal, gas and electricity, was due to higher prices for coal.

The index for materials purchased by manufacturing industry other than the food, drink and tobacco industries, at 161.6, also remained virtually unchanged between June and July. (Here again, for the reason given above, the June index has been revised from a provisional figure of 157.2 to 161.4 – a 2¾ per cent increase.) Further higher prices for crude oil again made the most significant contribution, although these were cushioned to a large extent by the large appreciation of sterling against the dollar. Prices for materials other than crude oil, which also benefited from sterling's appreciation, fell by 1¾ per cent; there were lower prices for many imported commodities, particularly copper, lead, woodpulp and hides and skins. On the other hand there were higher prices for coal for carbonising.

Among the published indices of materials and fuel purchased by individual sectors of manufacturing industry, the highest monthly increases occurred in the chemicals and allied industries and the bricks, cement etc industries, both of which experienced a 3½ per cent increase. They also experienced the highest three-monthly increases: 9½ per cent for the chemicals and allied industries and 7½ per cent for the bricks, cement etc industries.

At the opposite extreme two industries experienced a fall between June and July: the index for the non-ferrous metals industry fell by 4¾ per cent and that for the paper industries fell by 1 per cent, even though both were affected by the higher fuel oil prices.

These higher prices for fuel oil affected many of the indices for individual industry sectors. They accounted for about half of the 2¾ per cent increase in the index for the pottery and glass industries and the 2 per cent increase in the index for the steel industries (the other main factor affecting the steel index was higher prices for coal), and for three-quarters of the 1 per cent increase in the index for the textile industries. In addition they made significant contributions to the 3½ per cent increases in the indices for the chemicals and allied industries and for the bricks, cement etc industries and to the 1¼ per cent increase in the index for the shipbuilding and marine engineering industries.

Almost one half of the 1½ per cent increase in the index for the timber industries was accounted for by higher prices for plywood and blockboard and for imported softwood.

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Notes on wholesale price indices

1 Detailed notes on index numbers of wholesale prices were last shown in *Trade and Industry*, 27 April 1979.

2 The index numbers are constructed on a net sector basis. This is to say, the price movements used to compile the index for a particular sector of industry are only those relating to transactions between the sector and other sectors. Transactions between undertakings in the same sector are exluded. Thus index numbers for the whole of manufacturing industry are not weighted averages of sector index numbers.

3 All the index numbers are compiled exclusive of value added tax and (before its abolition) of purchase tax. Revenue duties (on cigarettes and manufactured tobacco, alcoholic liquor, matches and mechanical lighters) are included. The duty on hydrocarbon oils is excluded from output price series that cover these products (unless specifically noted to the contrary) but is included in series for materials and fuel purchased by sectors of industry.

4 Indices for the latest two months are always provisional at all levels of aggregation because of the degree of imputation present for items for which the latest prices are not available. In the main the degree of imputation for earlier months has reduced sufficiently to allow the indices to be declared firm. Where imputation remains high however, provisional indices are published for periods longer than two months.

5 Even firm indices can contain some imputation and occasionally information is received which could produce a change in the value of an index which has already been published as firm. Only if the change is significant will it be made. Where such a change is made for an index which is no longer appearing in the table the revised index or indices are shown in a supplementary table immediately after the table in question.

6 The monthly indices relate to the average prices for the month. Where a price change occurs on any day other than the first of the month the full effect of the price change will only be reflected in the index for the following month.

7 Where extension of indices on base 1970 = 100 is required for contract purposes the multiplication factors and explanatory notes are shown in *Trade and Industry*, 15 December 1978.

Table 2 Price index numbers of output (home sales)

1975 = 100

1968 SIC Orders or MLH numbers		1978			1979		1978		1979						
		2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr p	Jul	Dec	Jan	Feb	Mar	Apr	May	Jun p	Jul p
Orders III to XIX	Output of manufactured products	151.8	154.8	157.3	161.6	168.0	153.8	158.3	160.0	161.7	163.2	165.5	167.7	170.8	174.5
Orders IV to XIX	Products of manufacturing industries other than food, drink and tobacco manufacturing industries	149.4	152.3	155.2	160.0	167.3	151.4	156.0	158.1	160.1	161.9	164.6	167.1	170.1	174.5
	Output of selected broad sectors of industry														
211 to 229	Food manufacturing industries	160.1	163.7	165.7	169.8	175.0	162.9	167.6	168.9	170.0	170.5	172.1	174.2	178.6	180.4
211 to 229 (excluding MLH 219)	Food manufacturing industries (excluding animal and poultry foods)	162.1	165.3	167.7	171.3	176.3	164.3	169.6	170.7	171.4	171.9	173.2	175.5	180.3	182.1
Order V	Chemicals and allied industries	142.8	144.2	146.7	152.1	162.3	143.6	147.5	149.9	151.9	154.5	160.5	162.5	164.0	166.9
Order VI	Metal manufacturing	152.7	156.6	160.4	166.2	173.7	155.2	161.5	163.1	166.2	169.3	172.7	173.8	174.7	176.9
311 and 312	Steel industries	152.8	156.6	158.7	160.8	165.5	155.2	159.3	159.7	160.9	161.8	165.1	165.5	165.8	170.2
Orders VII to XII	Engineering and allied industries	151.0	154.8	158.4	163.4	168.3	153.6	159.8	162.3	163.4	164.5	166.6	168.2	170.0	172.3
Order VII (excluding MLH 342)	Mechanical engineering	150.7	154.4	158.2	163.6	168.2	153.0	159.7	162.5	163.7	164.6	167.3	168.3	169.1	171.7
Order VIII	Instrument engineering	147.2	149.4	152.7	158.6	161.2	148.8	154.3	157.1	159.2	159.4	160.6	160.8 p	162.1	164.8
Order IX	Electrical engineering	142.9	145.2	148.7	152.4	156.9	144.2	149.6	151.3	152.1	153.8	155.6 p	156.9 p	158.1	161.6
Order XI (excluding MLH 383)	Vehicles	160.0	165.5	168.6	174.0	179.2	164.9	170.9	173.4	174.1	174.6	175.7	179.1	182.7	183.5
Order XII	Metal goods industries n.e.s.	155.6	159.9	164.2	169.6	175.6	157.4	164.8	167.3	169.7	171.7	174.6	175.3	176.8	178.8
Order XIII	Textile industries	145.5	148.9	151.3	155.8	160.5	147.6	151.8	154.4	155.8	157.3	159.0	160.5	162.0	164.4
Order XV	Clothing and footwear	140.8	144.3	147.9	152.2	156.3	143.1	148.5	151.5	152.2	152.8	154.3	156.8	157.7	160.0
441 to 445 and 449	Made-up clothing	139.3	142.9	146.6	150.4	153.8	141.6	147.2	149.7	150.5	151.0	152.4	154.2	154.9	157.4
461, 464 and 469	Bricks, cement etc, industries	166.2	170.3	173.3	179.3	186.9	169.2	173.8	177.1	179.2	181.6	184.4	186.9	189.4	192.8
462 and 463	Pottery and glass industries	155.4	158.3	163.7	166.0	168.1	157.5	163.7	165.1	166.4	166.6	166.9	168.2	169.3	173.9
Order XVII	Timber industries	145.8	148.9	151.3	156.9	162.0	147.7	152.2	154.7	157.2	158.7	160.4	161.6	163.9	167.5
481 to 484	Paper industries	133.5	134.5	138.2	142.0	149.2	134.2	139.0	141.1	141.6	143.2	146.7	149.5	151.3	152.5

p Provisonal

Table 3 Commodities produced in the United Kingdom (home sales)

1975 = 100

1968 SIC order or MLH and industry	1978 Jul	1979 Apr	May	Jun p	Jul p
II Mining and quarrying					
101 **Coal**	151.9	168.6	168.6	168.6	183.3
102 **Stone and slate quarrying and mining**	172.4	183.4	198.2 p	200.8	208.9
Stone quarrying and mining					
Limestone and dolomite	180.5	193.0	209.8 p	212.2	220.6
Uncoated limestone roadstone and aggregates	166.1	177.0	191.0 p	194.4	202.2
Coated limestone roadstone	174.2	187.2	199.9	202.8	211.4
Granite	157.0	164.7	176.9	179.4	186.5
Granite and other chippings, aggregates and roadstone	152.2	160.3	176.6	181.0	186.8
Granite and other chippings	151.1	158.9	177.3 p	183.7	190.8
Coated granite and whinstone roadstone	160.1	167.6	177.1	178.4	186.4
Slate quarrying and mining					
Roofing slates	204.4	228.6	228.6	241.8	259.0
103 **Chalk, clay, sand and gravel extraction**	176.2	198.0	199.4	200.9	209.5
Sand and gravel (uncoated)	206.3	231.8	234.4	237.1	247.1
Sand and gravel (ex-pit or works)	206.7	234.3	236.7	239.4	249.6
Sand and gravel (delivered)	181.3	207.2	207.6	207.6	217.2
Clay, brick, earth, marl and shale					
China clay	141.4	159.1	159.1	159.1	166.1
109 **Other mining and quarrying**	173.4	191.1	191.1	191.3	196.8
109/3 **Salt**	189.5	214.7	214.7	215.1	218.4
III Food, drink and tobacco					
231 **Brewing and malting**	149.3	157.6	159.2	159.2	159.2
240 **Tobacco**	156.0	161.4	161.6	164.6	168.5
IV Coal and petroleum products					
261 **Coke ovens and manufactured fuel**					
Foundry coke	152.5	166.1	166.1	166.1	166.1
262 **Mineral oil refining**					
Motor spirit (including duty) [1]	130.9	140.4	143.2	157.5	176.1
Gas/diesel oil (including duty) [1]	166.0	183.7	188.6	203.7	228.7
Gas oil fuel (including duty) [1]	168.6	189.0	194.6	209.4	236.3
Derv (including duty) [1]	160.3	170.7	173.7	189.6	209.8
Medium fuel oil (950 seconds including duty) [1]	169.5	179.1	187.1	200.2	220.3
263 **Lubricating oils and greases**	140.4	164.6	165.8	167.9	173.0
V Chemicals and allied industries					
271 **General chemicals**	145.3	174.6 p	177.2 p	179.0	183.1
271/1 **Inorganic chemicals**	154.7	166.8	168.8 p	170.5	173.4
Inorganic acids and oxygen compounds of non-metals	135.0	141.5	143.4 p	143.5	144.1
Sulphuric acid and oleum	144.5	159.4	162.2	162.2	163.0
Metallic oxides, hydroxides, peroxides and other inorganic bases	154.7	170.0	174.1 p	180.0	183.2
Metallic salts and peroxy salts of inorganic acids	155.4	172.1	173.4	173.4	174.2
Soda ash	170.3	188.9	188.9	188.9	192.2
Metallic salts and peroxy salts of inorganic acids-other than soda ash	151.4	167.6	169.3	169.3	169.3
271/2 **Organic chemicals**	138.5	184.7 p	186.8 p	188.3	192.5
Hydrocarbons other than products of coal tar etc	128.5	207.6	209.1	209.7	214.5
Halogenated, sulphonated, nitrated or nitrosated derivatives of hydrocarbons	154.0	183.7	184.5 p	185.3	188.8
Alcohols, phenols and pheno-alcohols	129.4	178.2	180.9 p	182.1	185.8
Nitrogen function compounds	139.2	155.2	160.0 p	161.7	164.6
271/3 **Other chemicals**					
Bleaching materials	179.0	205.5	206.1	206.1	212.7
Plasticisers, mixed or unmixed	129.3	164.8	171.7	179.4	183.9
272 **Pharmaceutical chemicals and preparations**					
Pharamaceutical chemicals					
—central nervous system	171.6	181.1	181.8	186.7	191.4
Pharmaceutical preparations	153.6	162.6 p	165.5 p	166.2	168.4
—central nervous system	175.3	186.9	190.5	191.2	193.9
Anaesthetics	144.0	146.0	146.0	146.0	146.1
Analgesics	166.6	179.9	186.9	188.3	192.5
Psycho analeptics	178.5	182.3	182.3	182.3	185.3
—cardiovascular system	172.4	175.0	181.6	181.6	183.7
Plain hypotensives	170.7	171.2	171.2	171.2	174.2
—respiratory system	178.0	186.1	187.9	189.2	190.4
Cough and cold preparations	177.0	194.9	194.9	198.1	200.8
—alimentary tract and nutrition	139.1	156.4 p	159.0 p	160.1	165.5
—dermatologicals	151.8	154.6	154.6	155.0	156.6
—general anti-infectives					
Antibiotics	127.2	128.6	131.4	132.3	134.2
Penicillins	151.0	154.9	161.6	163.5	166.4
273 **Toilet preparations**	148.7	159.8 p	159.9 p	160.7	163.8
—specifically for men	148.5	158.6	158.8	158.7	162.2
After-shave, cologne and pre-shave lotions in alcoholic lotion form	165.8	178.4	178.4 p	178.3	184.3
—other than specifically for men	148.8	160.0 p	160.1 p	161.0	164.0
Hair preparations (excl. shampoos)					
Talc and dusting powders and bath preparations	157.8	170.8 p	170.8 p	170.8	170.8
Talc and dusting powders	153.8	167.3	167.3 p	168.6	177.7
Bath oils, cream and liquid essences	138.3	153.8 p	153.8 p	155.8	157.1
Make-up preparations	146.5	157.0	157.2	158.0	163.2
Lipsticks and lip glosses inc. lipsalve	145.9	154.3	154.3	155.4	159.8
Face powders	147.4	165.3	165.3	165.3	174.8
Liquid and cream facial make-up preparations	153.1	166.4	166.4	167.3	171.5
Eye shadow and mascara	152.3	162.0	162.0	162.0	166.7
Nail preparations	131.1	140.3	140.3	140.6	146.9
Creams and lotions	137.8	147.7	148.0	150.0	152.5
Facial beauty care preparations	136.3	143.3	143.6	145.5	148.2
Cleansing creams, cold creams, lotions and milks, moisturisers, nourishing and night creams	133.4	141.3	141.6	143.5	146.9
General creams and lotions					
Hand creams, lotions and gels	163.1	172.1	172.7	176.5	182.0
Deodorants, anti-perspirants and depilatories	134.1	141.9	141.9	141.9	142.2
Dental toothpaste and powder	145.9	155.1	155.3	155.3	160.1
Soapless shampoos	160.4	175.1 p	175.1 p	175.1	176.9
274 **Paint**	140.9	153.5 p	153.5 p	155.8	158.5
Air drying and stoving finishers, undercoats, primers, surfacers and sealers, varnishes and lacquers					
Building structural and preservative products	141.0	151.8 p	151.8 p	153.4	155.5
Emulsion paints	138.5	149.2 p	149.2 p	150.4	152.1
Filling and sealing compounds of all types	134.5	147.6	148.8	153.7	154.0
275 **Soap and detergents**	135.8	144.0	146.3	149.8	151.9
Fatty acids	146.9	153.3	152.0	151.2	153.5
Soap (excluding scouring preparations)	131.4	137.7	138.8	141.0	143.7
Toilet soap in tablet form	129.3	134.9	135.5	137.3	140.8
Finished synthetic detergents compounded materials primarily for washing purposes	133.5	143.3	146.4	151.8	152.3
276 **Synthetic resins and plastics materials and synthetic rubber**	141.4	167.2	171.5	172.5	175.4
276/1 **Synthetic resins and plastics materials**	141.2	169.1	174.0	175.0	177.9
Products of condensation, polycondensation and polyaddition	141.9	164.6	168.6	170.6	173.0
Products of polymerisation and copolymerisation	138.1	175.8	179.8	181.3	185.4
Acrylics	129.0	141.6	142.7	145.8	149.2
Polyethylene granules, compounds and powders	134.4	176.8	184.2	185.7	189.0
Styrene polymers and copolymers	133.0	180.1	187.9	190.1	193.3
Cellulosics and other plastics and modified natural resins	134.4	146.4	147.2	147.2	148.4
Intermediate forms between the resin and semi-fabricated stages	147.7	179.8	182.4	182.4	182.6
Semi-finished products	145.9	160.7	170.4	170.4	172.7
Polyvinyl chlorides	156.3	187.3	192.0	192.0	195.3
277 **Dyestuffs and pigments**	156.9	170.1	173.1	180.6	181.2
Pigments	155.5	171.9	173.1	180.8	180.9
White lead [2]	155.8	232.3	243.5	273.3	245.5
278 **Fertilisers**	136.8	145.6	145.6	142.7	144.3
279 **Other chemical industries**	144.5	158.0	159.2	162.4	165.8
Explosives fireworks etc	152.5	169.4 r	170.7	173.6	180.5
279/4 **Formulated pesticides**	145.1	153.3	155.9	157.2	162.6
Disinfectants	140.5	149.9	151.8	151.8	154.1
Pesticides	156.1	165.7	165.9	166.1	166.1
Insecticides (other than seed dressings)	158.5	166.9	166.9	167.1	167.1
Containing organophosphorous compounds	131.1	126.9	126.9	126.9	126.9
Preparations for plant control					
Herbicides	141.5	148.7	148.7	152.4	166.2
279/6 **Surgical bandages, etc**	144.8	156.0	159.2	165.4	166.9
Surgical and medicated dressings	148.3	161.0	164.6	173.6	174.4
Disposable sanitary goods					
Sanitary towels and tampons	141.7	151.4	154.3	158.1	160.2
279/7 **Photographic chemical materials**	145.0	151.7	151.3	153.5	156.3
VI Metal manufacture					
311/2 **Steel**	154.7	163.5	164.3	164.7	169.7
Non-alloy steels	153.7	161.8	162.4	162.5	166.8
Ingots, blooms, billets, slabs	163.4	178.6	180.4	180.4	180.4
Heavy rails, sleepers and fishplates, etc	148.6	160.1	160.1	160.1	160.1
Heavy rolled products, 80 mm and over	161.4	163.9	163.9	163.9	172.4
Angles, tees and other sections	156.8	160.7	160.7	160.7	160.7
Girders, beams, joists, columns	163.2	165.1	165.1	165.1	177.5
Rods and bars in coils	149.6	161.7	163.7	163.7	163.7
Steel strip (non-alloy)	151.5	159.6	161.6	161.6	164.7
Hot rolled strip (under 600 mm wide)	153.4	156.7	156.7	156.7	161.4
Plates in coils and cut lengths	136.3	138.2	138.2	138.2	138.9
Steel sheet (under 3 mm thick)	160.1	162.5	162.5	162.5	170.2
Uncoated steel sheet	165.3	168.1	168.1	168.1	175.0
Uncoated steel sheet hot rolled	149.0	152.4	152.4	152.4	158.6
Uncoated steel sheet cold reduced	167.0	169.6	169.7	169.7	176.7
Electrical steel sheet	165.3	168.0	168.0	168.0	181.4
Galvanised steel sheet	146.6	148.0	148.1	148.1	154.6
Light sections	144.5	147.1	151.8	152.0	152.0
Tinplate and blackplate	163.4	172.7	172.7	172.7	172.7
Tinplate	163.6	172.8	172.8	172.8	172.8
Blackplate	155.2	162.4	162.4	162.4	162.4
Bright steel bars, non-alloy	163.6	181.4	184.1	184.6	188.1
Forgings (other than drop forgings)	172.5	182.1	182.7	185.5	188.2
Non-alloy steel castings	162.1	182.7	183.1	183.6	184.8
Stainless and heat resisting alloy steels	150.7	154.3	159.8	160.5	166.3
Sheets (under 3 mm thick)					
Stainless steel sheets	166.4	167.0	173.7	175.0	185.5
Stainless steel castings	153.7	174.5	174.5	174.6	174.7
Alloy steels other than stainless and heat resisting	163.8	180.3	181.8	183.9	194.4
Ingots, blooms, billets, slabs (excluding tube)	172.4	193.3	193.7	198.7	214.9
Bars and rods other than in coil (excluding bright bars)	157.9	172.8	173.1	174.8	183.5
Plates in coils and cut lengths	134.9	138.6	138.6	138.6	154.1
Alloy steel castings	156.0	176.2	176.5	176.8	177.4

Table 3 **Commodities produced in the United Kingdom (home sales)** *continued*

1975 = 100

1968 SIC order or MLH and industry	1978 Jul	1979 Apr	May	Jun p	Jul p
Structural steel	149.0	151.5	152.1	152.2	157.1
Steel for reinforcement (cut, bent, and delivered)	152.2	171.6	171.6	171.6	171.6
Light re-rolled bars and sections	147.5	156.7	158.4	158.4	164.2
All types of steel forgings (other than drop forgings)	174.5	186.8	188.5	189.1	200.5
312 **Steel tubes**	158.3	167.9	169.7	169.7	170.3
Fittings for steel tubes	149.2	155.4	155.4	155.4	156.3
Steel tubes (other than electric conduit tubes)	161.0	173.4	174.2	174.2	175.7
313 **Iron castings and pig iron**	153.1	172.6	174.6 p	175.3	176.1
313/3 | 313/4 **Iron castings**	153.4	173.2	175.7 p	176.4	177.1
313/3 **Engineering castings**	150.8	167.9	169.1 p	170.2	171.0
Vehicle iron castings	148.3	168.1	168.2 p	168.2	168.2
Industrial and marine iron castings	152.8	167.7	169.9	171.8	173.3
Heavy engineering	150.9	168.0	168.0	170.3	170.3
Light engineering and hydraulic	154.0	167.1	167.7	168.5	170.8
313/4 **Other iron castings**					
Building and domestic goods	161.1	190.8	190.8	191.3	192.8
Cast and spun iron pipes and fittings	152.0	167.4	184.1	184.8	185.9
321 **Aluminium and aluminium alloys**					
Semi-manufactures (excluding castings and forgings)					
Aluminium plate, sheet, strip, circles and blanks	177.8	183.0	182.2	182.2	182.2
Aluminium extrusions and tubes (bars, rods, sections, etc)	175.8	184.4	185.5	185.5	185.5
Aluminium forgings	171.5	191.5	191.5	191.5	191.5
322 **Copper, brass and other copper alloys**					
Copper					
Copper tubes	144.7	198.5	197.5 p	194.7	194.7
Copper sheet and strip	137.0	181.0	172.4	167.2	163.9
Brass and other copper					
—unwrought	128.1	166.0	161.3	155.9	158.2
—semi-manufactures	127.9	166.1	161.1	155.9	153.7
323 **Miscellaneous non-ferrous metals**					
Lead and lead alloys					
—semi-manufactures	160.4	267.0	274.8	285.3	282.4
Nickel [3]	117.2	144.6	178.2	173.4	148.1
Titanium	175.0	212.0	212.0	228.3	230.1

VII Mechanical engineering

331 **Agricultural machinery**	165.1	179.2	179.4 p	179.9	183.8
Soil preparation and cultivation machinery	162.8	174.2	174.2	174.3	178.1
Harvesting, threshing, feed processing etc, machinery	168.0	183.3	183.6 p	183.7	185.6
Pick-up balers	167.9	179.8	179.8	179.8	181.6
Grinding mills and meal mixers excluding combined mills and mixers)	163.1	176.1	176.1	179.4	180.0
Milking machinery					
Milking machines, including parts	170.4	186.1	186.1	191.1	193.4
Elevators and conveyors (excluding tractor mounted hydraulic loaders)	173.5	186.4	186.4	186.4	193.3
332 **Metal working machine tools**	157.5	172.4	173.9 p	177.6	179.8
332/1 **Metal cutting machine tools**	159.2	173.7	175.5 p	180.3	183.1
332/2 **Metal forming machine tools**	154.1	170.8	170.8	172.4	173.5
333 **Pumps, valves, compressors and fluid power equipment**	147.6	161.4	162.3	163.5	164.6
333/1 **Pumps**	151.4	164.5	165.9	166.5	167.5
Industrial pumps	151.8	164.7	166.1	166.6	167.7
Centrifugal pumps	151.5	162.6	163.8	164.5	165.6
Positive displacement pumps	152.7	171.5	173.6	173.6	174.7
Kerbside petrol and oil measuring pumps and parts	144.6	161.8	163.2	163.2	163.2
333/2 **Industrial valves**	139.9	154.2	154.0	155.7	157.3
Valves – ferrous metal	135.9	148.1	147.8	148.2	150.1
Iron valves	151.0	165.4	165.6	165.8	167.1
Steel valves	130.9	142.4	141.9	142.4	144.4
Valves – non-ferrous metal	151.4	171.8	171.6	177.1	178.1
333/3 **Air and gas compressors**	155.9	168.8	171.8	175.0	176.8
333/4 **Fluid power equipment**	149.6	163.9	165.0	165.9	166.4
Oil/hydraulic fluid power equipment	151.7	167.6	168.7	170.1	170.8
Pneumatic control fluid power equipment	145.7	157.0	158.3	158.3	158.3
334 **Industrial engines**	168.7	185.2	183.3	183.5	184.2
Diesel compression internal combustion engines	168.9	186.2	184.2	184.4	185.1
336 **Construction and earth-moving equipment**	171.2	182.5	183.4	185.0	185.9
Excavators, trenchers, ditchers and digging machinery including parts	180.7	193.4	196.7	196.7	198.1
Wheeled tractor shovels, crawler tractors, dumpers and other earth-moving equipment	170.7	180.0	180.0	182.4	182.6
Dumpers and dump trucks	152.3	166.8	166.8	171.8	172.2
Concrete mixing and placing machinery	157.7	169.4	169.4 p	173.7	175.4
Crushing, pulverising and screening plant, including parts	160.7	172.9	173.6 p	174.4	175.9
337 **Mechanical handling equipment**	153.0	168.3 p	169.2 p	169.6	171.8
337/2 **Cranes and transporters**	151.4	168.5	168.7	168.7	176.6
337/4 **Lifting and winding devices**	152.4	166.5	173.0	173.3	175.0
337/5 **Powered industrial trucks and tractors**	161.9	175.3	175.6 p	175.8	176.1
339/1 **Mining machinery**	146.9	160.7 p	162.4 p	162.7	164.2
339/3 **Refrigerating machinery**	164.4	177.8	177.8	181.6	183.4
339/5 **Scales and weighing machinery (excluding precision balances)**	154.1	169.4	169.4 p	187.6	189.7
339/6 **Portable power tools**	151.7	161.5	161.7	162.7	171.3
Portable power tools, non-electric – pneumatic					
—for civil engineering, mining and quarrying	158.6	172.8	173.9	177.0	180.0
—for general engineering	165.5	178.2	178.2	178.9	179.4
Portable power tools, electric	145.7	153.0	153.0	153.5	166.7
—power drills	151.9	157.4	157.4	158.0	176.1
339/7 **Food and drink processing machinery**	153.7	170.7	171.0	171.4	177.9
339/9 **Miscellaneous (non-electrical) machinery**	157.7	172.5 p	173.6 p	174.5	177.2

VIII Instrument engineering

352 **Clocks, watches and time recorders**	154.0	165.4 p	165.4 p	165.4	169.3
Clocks	158.2	170.9	170.9	170.9	171.8
354 **Scientific and industrial instruments and systems**	146.1	157.4 p	157.9 p	159.6	162.1
354/2 **Other scientific and industrial instruments and systems (non-optical)**					
Analytical instruments	144.7	158.3	159.0	159.7	162.5
Spectrophotometers and absorptionmeters	135.5	144.6 p	146.1 p	146.6	148.2
Electrical measuring, testing and controlling instruments and apparatus	143.0	151.5	151.6	151.8	154.2

IX Electrical engineering

365 **Broadcast receiving and sound reproducing equipment**	128.4	134.9 p	135.1 p	135.4	140.2
365/1 **Gramophone records and pre-recorded tapes**	143.5	161.5	162.0	162.1	178.0
Gramophone records	144.9	163.9	164.4	164.5	180.6
—33⅓ rpm	146.0	164.7	164.9	164.9	179.8
—45 rpm	139.6	160.1	162.3	162.7	184.4
Pre-recorded tapes (other than video)	136.9	150.3	150.3	150.3	165.5
365/2 **Broadcast receiving and sound reproducing equipment, other than gramophone records and pre-recorded tapes**	123.7	126.8 p	126.9 p	127.2	128.6
Domestic television receivers	126.2	130.3 p	130.3 p	130.3	131.8
—monochrome	126.9	133.9 p	133.9 p	133.9	135.7
—colour	126.1	129.9 p	129.9 p	129.9	131.4
Stereo audio systems, incorporating turntable/amplifier	111.8	113.7 p	114.0 p	114.4	115.9
368 **Electrical appliances primarily for domestic use**	154.0	167.3 p	167.8 p	168.1	170.5
Domestic electric cooking apparatus	156.8	174.2	174.5	174.8	177.1
Domestic electric flat irons	148.2	165.5	165.5	165.5	167.3
Domestic electric heating apparatus	159.5	175.3	177.6	178.6	179.5
Domestic space heating apparatus	164.2	181.8	182.1	182.1	182.1
Electric water heaters	161.3	172.4	181.8	186.5	190.5
Vacuum cleaners	156.3	166.3	166.3	166.3	172.1
Domestic refrigerators and freezers	145.2	150.3	150.3	150.3	152.6
Miscellaneous domestic electric appliances (includes food and drink mixers, hair dryers and dry shavers)	153.5	169.6 p	169.7 p	169.7	169.7
369/4 **Electric lamp bulbs and tubes**	155.4	165.1	165.1	166.6	171.2
Fluorescent tubular lamps	155.4	167.3	167.3	169.3	175.4
Electric lamp bulbs, filament type —exceeding 28 volts	157.4	165.6	165.6	168.7	174.7
Primary and secondary batteries	162.5	187.9	190.3	193.8	201.2

XI Vehicles

380 **Wheeled tractors, complete**	183.9	194.3	194.5	199.5	204.1
381 **Motor vehicles**	165.4	176.2	179.9	183.4	184.0
Passenger cars	169.7	178.3	182.7	186.2	187.1
Passenger cars [3]	169.7	178.3	182.7	191.5	199.2
Commercial and public service vehicles	167.8	179.7	184.6	191.2	191.2
Commercial vehicles	169.2	178.7	183.2	190.3	190.4
Commercial vehicles and chassis not exceeding 3.5 tons gvw	176.2	186.5	192.9	199.8	199.8
Commercial vehicles and chassis exceeding 3.5 tons but not exceeding 16 tons gvw	167.0	176.3	180.2	187.3	187.5
Commercial vehicles and chassis exceeding 16 tons gvw	163.4	171.7	174.3	181.9	181.9
Public service vehicles	164.9	181.3	187.2	192.5	192.5

XII Metal goods not elsewhere specified

390 **Engineers small tools and gauges**	169.5	191.9	192.3	192.7	197.3
Engineers cutting tools	171.1	191.4	191.5	192.1	194.6
Hard metal tipped tools	186.7	205.3	205.3	205.3	205.3
Diamond tipped tools and diamond dies	177.2	238.1	238.7	238.7	239.3
Saws					
Hacksaw blades	186.0	222.6	222.6	222.6	228.6
Milling cutters	153.5	165.7	165.7	167.6	167.6
Lathe and planer tools	176.4	230.1	231.2	231.2	239.9
Engineers gauges and measuring instruments	170.0	191.8	192.1	192.9	202.1
391 **Hand tools and implements**	163.7	177.5	178.3	178.3	186.0
Agricultural, horticultural and foresters hand tools	178.-	187.8	188.1	188.2	203.0
Hand saws and hand saw blades	192.7	207.2	209.8	211.1	226.7
Hand tools and implements excluding agricultural and foresters hand tools and saws and saw blades	159.8	175.6	175.7	175.7	179.8
Pliers, pincers and nippers, etc	187.3	206.2	206.2	206.2	215.6
Spanners and wrenches	164.1	182.5	182.5	182.5	190.9
Planes, hammers, cold chisels etc, screwdrivers, wood chisels and gouges	157.0	176.1	176.1	176.1	178.7
Measuring and marking out tools	146.1	155.7	164.1	164.1	179.6
392 **Cutlery, spoons, forks and plated tableware etc**	157.2	172.3	172.3	175.0	178.5
Finished cutlery suitable for domestic or personal use	156.0	171.1	171.1	171.1	177.8
Scissors and tailors' shears (including pinking shears)	157.5	171.8	171.8	171.8	195.9

Table 3 Commodities produced in the United Kingdom (home sales) *continued*

1975 = 100

1968 SIC order or MLH and industry	1978 Jul	1979 Apr	May	Jun p	Jul p
Finished spoons and forks of all kinds (incl. fisheaters, butter knives and ladles) of stainless steel	167.2	178.2	178.2	178.2	178.2
Bolts, nuts, screws, rivets etc	168.6	177.1	177.9	181.3	184.8
Precision standard bolts etc, of high tensile steel	150.1	153.1	153.6	153.6	156.5
Wire and wire manufactures	149.6	174.6	174.9 p	174.4	174.5
Iron and steel wire	151.9	173.6	175.0 p	175.1	176.6
Single drawn wire other than alloy and high carbon steel	152.2	172.2	173.8	174.0	174.0
Wire ropes (excluding insulated electric wire and cable)	144.5	159.2	161.2	161.2	166.3
Iron and steel woven wire, cloth gauze fabric etc, (excluding netting and fencing) of square or rectangular mesh	160.0	173.3	173.3 p	173.3	173.6
—stainless steel	151.3	162.6	162.6 p	162.6	163.5
—other than stainless steel	164.5	178.9	178.9 p	178.9	178.9
Other wire manufactures, ie grille netting, fencing reinforcement fabric etc	152.9	170.3	170.4	170.4	173.6
Wire of copper, brass and other copper alloys					
Woven wire cloth, gauze fabric, etc, of copper and brass, etc	151.1	174.9	175.7 p	175.7	175.7
Reinforcement fabrics	150.3	162.2	162.2	162.2	166.4
Chain link fencing	160.6	185.8	186.0	186.0	189.1
399 **Metal industries not elsewhere specified**	155.7	171.6	172.6 p	174.2	176.0
399/1 **Metal furniture**	149.7	162.8	163.6 p	171.9	174.4
Office metal furniture	156.7	179.3	180.8 p	181.1	181.6
Filing cabinets and other filing containers	156.2	186.0	186.0 p	186.2	186.2
399/2 **Metal windows and door frames**	165.4	186.3 r	188.7	191.0	195.0
399/6 **Domestic hollow ware**	157.5	174.4	174.4	174.4	181.5
Cookware	160.9	181.6	181.6	181.6	191.8
399/7 **Vats, tanks, cisterns and other industrial hollow ware**	154.6	170.5	172.6 p	172.7	175.7
Steel drums	157.5	170.9	173.2	173.2	176.1
399/8 **Needles, pins, fishhooks and other metal smallwares**	175.6	189.0	191.0	191.2	194.4
399/9 **Domestic gas appliances**	162.2	172.1	172.6	174.1	179.9
Gas cookers	161.0	170.8	171.1	173.4	178.6
Gas fires and space heaters	164.7	174.8	176.2	176.2	182.3
Water heaters and other domestic gas apparatus (excl. refrigerators and meters)	162.6	172.7	172.7	173.1	181.0
399/12 **Miscellaneous metal goods**					
Sanitary ware and plumbing fixtures and fittings	159.4	182.7	182.8	185.1	185.9
Fire extinguishers (hand operated chemical type only)	140.9	153.3	153.3	155.7	165.5
Catering equipment	158.0	174.7	176.3	178.2	178.2
Plumbers brassware	157.4	185.0	185.4	186.5	187.4
XIII Textiles					
411 **Man-made fibres production**	127.8	136.8	138.3	138.5	141.5
Man-made fibres – continuous filament yarn	137.5	151.3	154.2	154.1	155.7 e
412 **Spinning and doubling on the cotton and flax systems**					
Single yarns spun on the cotton and flax systems	145.5	156.4	159.6	160.1	160.2
Single yarns of man-made staple fibres spun on the cotton and flax systems	140.3	150.2	153.2	154.6	155.8
Man-made continuous filament yarns, textured, bulked or crimped, – synthetic fibres	122.9	140.8	142.3	144.5	146.0
Finished thread for sewing, embroidery, etc	166.8	181.1	181.1	181.5	195.4
—of man-made fibres	140.0	151.2	151.2	152.2	164.1
413 **Weaving of cotton, linen and man-made fibres**	137.8	149.3	151.7	152.4	154.2
Woven cotton cloth in the loomstate	144.1	156.6	158.3	159.2	161.7
Cloth wholly of man-made continuous filament yarn in the loomstate	133.0	149.5	153.2	153.4	154.6
Woven linen	166.0	178.1	181.2	183.3	184.7
Woven fabric of glass fibre	164.6	173.5	173.5	173.6	182.2
414 **Woollen and worsted products**	155.8	167.2	169.2	168.9	169.3
414/1 **Wool sorting, cleaning, etc and combing and top making**					
Wool tops [2]	165.5	172.7	169.4	167.5	164.3 e
414/2 **Yarns spun on the worsted and semi-worsted systems**	149.8	160.8	162.9	162.4	164.2
Yarns of wool spun on the worsted system	154.8	163.7	164.1	164.0	166.4
Yarns of man-made fibres spun on the worsted system	137.3	144.1	147.7	148.1	149.5
414/3 **Woven worsted fabrics**	148.9	155.7	157.7	158.2	158.6
414/4 **Wool rag** [2]	161.0	174.1	178.2	188.1	190.7 e
414/5 **Woollen spinning and weaving**					
Woven woollen fabrics (other than blankets)	161.7	174.8	178.3	178.4	178.7
Woven woollen fabrics (other than blankets) containing 50 per cent or more by weight of wool or fine animal hair	165.4	175.2	179.5	179.7	179.9
Spinning and weaving of jute and other yarns on the jute system	139.3	159.6	161.0	161.6	162.8
Spun yarns of jute and man-made fibres	143.9	163.7	164.2	164.8	168.6
Woven cloths of jute and man-made fibres	131.9	145.2	146.8	146.8	146.8
Woven cloths of polypropylene on the jute system	139.4	162.4	164.2	165.2	165.2
Rope, twine and net	124.6	136.8	137.3	138.9	139.6
Cordage, cables, ropes and twine of textile materials (excl. agricultural twines)	123.4	137.7	138.4	139.7	140.9
417 **Hosiery and other knitted goods**					
Socks and stockings	133.2	149.7	150.6	150.6	154.4
Women's socks and stockings	123.3	143.7	143.9	143.9	145.7
418 **Lace**					
Finished lace and lace net (other than made up articles) – Raschel and other warp knitting machine products	198.0	231.1	231.3	231.3	233.4
419 **Carpets and rugs**	148.5	161.0	162.0	166.7	169.9
Woven carpets and carpet type rugs —faced with yarn containing at least 50 per cent but less than 100 per cent by weight of wool	164.8	181.3	182.5	187.3	192.0
Rugs including pile fabric, deep pile knitted	150.0	167.7	167.7	168.7	168.7
421 **Narrow fabrics**					
Petershams, galloons and ribbons	154.6	170.9	171.4	176.9	178.9
422 **Made-up textiles**					
422/1 **Household textiles and handkerchiefs**	142.5	150.2	153.9	158.4	161.8
Hand and bath towels	152.1	157.7	163.0	173.9	173.9
429 **Other textile industries**	166.8	178.7	179.4	181.2	185.7
429/1 **Asbestos manufactures**	173.1	184.0	184.0	187.0	193.5
429/2 **Miscellaneous textile industries**					
Mechanically bonded fibre-needled fabrics	165.0	180.9	184.0	184.0	185.1
XIV Leather goods and fur					
431/1 **Leather**					
Finished leather – for footwear	137.9	191.0 p	198.0 p	204.0	210.0
432 **Leather goods**	148.9	166.2	167.8	172.6	174.5
XV Clothing and footwear					
441 **Weatherproof outerwear**	137.6	149.7	150.4	151.2	153.9
Raincoats (excl. those of infants)					
Raincoats other than of plastics materials	135.8	144.0	145.1	145.5	149.2
Weather protective industrial clothing of PVC coated materials	148.3	176.6	176.7	178.4	178.4
442 **Men's and boys' tailored outerwear**	134.8	149.0	149.4	149.4	151.4
Men's and boys' suits	140.4	157.1	157.1	157.1	159.1
Men's trousers (sold separately)	126.0	139.6	140.4	140.4	141.8
444 **Overalls and men's shirts, underwear, etc**	148.4	157.4	158.1	158.4	161.8
444/2 **Men's and boys' shirts, underwear and nightwear**	138.7	148.5	149.6	149.7	154.9
449 **Corsets, gloves and miscellaneous dress industries**	149.8	161.9	162.5	162.5	165.1
449/1 Corsets	137.0	149.2	150.8	150.8	154.4
Brassieres	163.1	175.7	175.7	175.7	180.1
449/3 **Umbrellas and walking sticks**	137.0	149.8	149.8	149.8	149.8
450 **Footwear**	148.1	161.4	165.9	167.5	169.3
Outdoor footwear	148.9	162.3	167.4	169.3	171.2
Boots and shoes with uppers wholly or mainly of leather	158.2	172.9	179.6	181.4	184.0
Men's boots and shoes with uppers wholly or mainly of leather	156.9	175.3	177.5	180.0	183.3
Women's boots and shoes – with uppers wholly or mainly of leather	163.4	176.3	183.2	185.3	187.4
Slippers, houseshoes and ballet shoes					
Women's slippers, houseshoes and ballet shoes	147.9	163.2	163.2	163.2	164.2
XVI Bricks, pottery, glass, cement, etc					
461 **Bricks, fireclay and refractory goods**	165.9	177.5 p	179.4 p	184.7	188.3
461/1 **Refractory goods**	167.7	184.2 p	185.7 p	185.9	190.1
Refractory bricks and shapes	169.3	178.2 p	179.6 p	179.7	185.3
Firebricks and shapes	156.3	163.1 p	168.3 p	168.4	171.5
461/2 **Clay building bricks and other non-refractory goods**	163.6	171.8	174.0	183.3	186.4
Common, facing and engineering bricks	163.8	171.2	173.4	183.8	186.5
Common bricks	162.8	171.6	172.8	185.9	187.4
—Non-fletton (ex-works)	164.4	180.5	182.6	190.7	193.4
—Fletton (delivered)	160.7	160.7	160.7	179.9	179.9
Facing bricks	165.3	171.7	174.3	183.7	187.5
—Non-fletton (ex-works)	169.5	179.4	183.3	187.1	193.0
—Fletton (delivered)	157.4	157.4	157.4	177.2	177.2
Engineering bricks (ex-works)	160.0	166.8	171.9	175.4	177.5
Engineering bricks (delivered)	162.1	171.2	171.2	174.9	187.4
Clay roofing tiles – (ex-works)	159.0	173.7	174.4	176.7	178.0
Unglazed floor quarry tiles – (ex-works)	165.1	176.3	176.3	176.3	176.3
462 **Pottery**	154.3	165.4	168.4	171.3	173.9
462/1 **Electric ware incl. insulators and insulator fittings wholly or mainly of ceramic material**	152.4	167.4	168.3	169.5	170.9
462/2 **Vitreous china sanitary ware and pottery tiles**	156.1	162.5	162.5	169.2	170.0
Tiles, excl. pre-cast concrete tiles	145.2	145.2	145.2	157.1	158.4
Vitreous china sanitary ware	170.3	185.0	185.0	185.0	185.0
463 **Glass**	158.6	167.9	168.6 p	169.0	174.3
463/1 **Glass other than containers and vacuum ware**	157.1	167.4	168.7 p	168.9	175.9
Flat glass	157.6	167.8	167.8	167.8	180.5
Domestic and ornamental glassware	161.4	173.5	173.5	173.5	175.9
—Hand gathered	158.8	169.1	169.1	169.1	176.5

Table 3 Commodities produced in the United Kingdom (home sales) *continued*

1975 = 100

1968 SIC order or MLH and industry	1978 Jul	1979 Apr	May	Jun p	Jul p
—Mechanically gathered	162.4	175.2	175.2	175.2	175.7
Laboratory hygienic and pharmaceutical glassware and balls, tubing and rods	152.5	166.4	170.3 p	170.3	173.2
Glazing sheet and plate glass	159.5	169.0	169.0	169.0	181.7
463/2 **Glass containers and vacuum ware**					
Glass containers	160.4	168.4	168.4	169.2	172.6
non-tubular for all products excl. wines, spirits, beer and cider	161.8	171.3	171.3	171.3	174.3
464 **Cement**					
Calcareous cement (other than clinker) delivered in bulk	169.2	187.3 p	187.3 p	187.3	187.3
Cement in bags	170.0	191.7 p	191.7 p	191.7	191.7
469/1 **Abrasives**	163.1	177.0	179.7	179.7	181.1
Abrasive wheels (disc wheels, segment sharpening stones and other forms of bonded abrasives incl diamond)	164.2	177.4	181.5	181.5	181.5
Coated abrasives – abrasive paper and cloth	161.1	176.2	176.2	176.2	180.4
469/2 **Miscellaneous building materials and mineral products**	170.7	186.5	189.9 p	192.0	196.2
Plasterboards	142.8	161.1	161.6	161.6	165.4
Precast concrete goods	163.2	174.5	180.5	181.2	185.7
Concrete blocks, bricks, kerbs and edgings					
Flagstones	160.6	180.7	187.6	188.1	191.0
Kerbs and edgings	150.8	170.1	177.1	177.5	180.6
Precast concrete building blocks – delivered	164.4	184.8	188.9	193.0	204.4
Precast concrete pipes to BS556 – delivered	174.9	176.5	177.6	177.6	179.4
Roofing tiles and fittings and concrete/terrazzo floor and wall tiles	152.6	166.9	167.1	167.1	174.2
Asbestos cement goods	195.4	230.6	230.6	230.6	230.6
Bituminous and flax felts	153.5	168.6	168.6	185.5	190.0
Insulating materials for thermal and acoustic purposes n.e.s.	158.6	174.2	174.2	174.2	175.3
Quicklime	185.2	203.4	203.4	203.4	203.4
Limestone based, polished etc	196.2	200.6	211.2 p	220.2	227.9
Plaster (gypsum)	143.2	162.0	162.5	162.5	166.4
XVII Timber, furniture, etc					
471/1 **Timber, sawmilling etc**					
Homegrown sawn hardwood	167.9	187.9	188.9	192.2	196.4
Hardwood flooring blocks and mosaic flooring	142.4	147.6	147.6	160.9	179.4
471/2 **Builders' woodwork**	153.6	165.2	165.8	171.5	174.8
Door sets, leaves and frames and window frames	157.0	170.0	170.4	170.6	175.6
Door leaves	156.4	170.8	171.1	171.4	178.2
Window frames	157.5	169.3	169.4	169.6	171.8
Timber structures and structural components	148.7	161.4	161.9	176.0	176.9
472 **Furniture and upholstery**	145.0	159.1	159.2	160.0	164.1
Domestic upholstered furniture	139.0	153.6	153.6	154.4	161.9
Domestic wooden furniture	149.2	164.4	164.7	164.7	167.4
Bedroom furniture, excl. built-in	146.6	156.8	156.8	156.8	159.4
Kitchen furniture (excl. built-in) other than tables and seating	152.4	172.9	174.8	175.3	176.4
Dining/living room furniture, excluding built-in	152.5	171.2	173.6	173.6	174.8
Seating	150.8	165.6	165.6	165.6	167.7
Occasional furniture for dining/living room	146.9	162.0	162.0	162.0	165.0
473 **Bedding and soft furnishings**	143.2	160.2	160.2	160.2	160.9
Fully finished mattresses	160.8	175.8	178.0	178.1	187.2
Bolsters and pillows (covered)	190.8	203.2	205.1	206.0	206.3
XVIII Paper, printing and publishing					
481 **Paper and board**	130.8	143.6	144.3	146.4	147.2
Printing and writing paper and all boards for printing (excl. newsprint)	129.5	145.5	146.3	151.0	152.0
Wrapping paper	121.1	135.7	137.1	137.4	137.4
All tissue stocks	128.3	133.6	134.0	134.0	134.0
Industrial and special purpose paper	127.2	138.9	138.9	140.1	142.9
Packaging boards	141.5	152.3	153.6	153.6	153.8
Industrial and special purpose boards	137.7	150.6	150.6	150.6	151.8
Packaging products of paper, board and associated materials	134.6	148.0	151.5	153.5	154.3
482/1 **Cardboard boxes, cartons and fibre-board packing cases**	128.5	151.1	154.6	156.6	157.5
Cartons	153.1	161.9	165.7	170.6	172.5
Fibre-board packing cases	126.1	142.0	144.5	144.8	144.8
—Solid	132.7	143.3	149.4	153.3	153.3
—Corrugated	125.6	141.9	144.2	144.2	144.2
482/2 **Miscellaneous packaging products of paper and film**	125.7	141.0	144.5	146.4	146.9
Paper bags	108.0	122.4	122.6	123.4	123.5
Paper sacks	125.7	141.8	148.6	150.2	151.2
483 **Manufactured stationery**	145.0	158.9	162.2	164.5	168.8
Commercial envelopes	133.5	145.4	154.2	157.3	157.3
Business forms	141.9	156.7	159.6	160.0	163.8
Continuous stationery	131.5	147.4	148.5	148.7	152.5
Stationery and scholastic books and ruled paper	156.5	174.6	178.5	186.4	186.4
Loose leaf supplies	144.5	156.1	156.4	159.9	167.4
Filing supplies	137.3	152.0	155.7	155.7	160.7
484 **Manufactures of paper and board not elsewhere specified**	137.6	147.1	150.2	150.4	150.5
484/2 **Miscellaneous manufactures of paper and board**					
Toilet paper	142.0	152.8	152.8	152.8	153.1
Household and sanitary tissue products	137.9	149.1	151.1	151.2	151.2
Handkerchiefs and facial tissues	139.5	151.7	151.7	151.7	151.7
Kitchen rolls and towels	136.0	148.5	148.5	148.5	148.5
XIX Other manufacturing industries					
491 **Rubber manufactures**	153.9	168.3	168.6	168.9	169.8
491/1 **Tyres and tubes**	150.9	163.5	163.6	163.6	163.6
New tyre covers	151.2	164.0	164.0	164.0	164.0
—cross-ply, car and van	149.5	166.3	166.3	166.3	166.3
—radial ply, car and van	150.5	162.8	162.9	162.9	162.9
—commercial vehicles	151.6	164.3	164.3	164.3	164.3
tractors, earthmovers and land/road	153.7	164.2	164.2	164.2	164.2
491/2 **Other rubber goods**					
Belting (of rubber or plastics)	156.8	169.1	174.2	178.2	182.4
Conveyor and elevator belting	159.9	174.4	180.8	185.1	188.2
Belting other than conveyor and elevator belting					
Transmission belting	148.4	154.9	156.4	159.4	166.7
Miscellaneous rubber products					
Cellular products of rubber	141.5	160.6	161.2	161.8	164.0
492 **Linoleum, plastics floor-covering, leathercloth etc**	135.5	144.7	150.9	155.7	157.9
493 **Brushes and brooms**	150.4	163.4	166.1	168.5	170.3
Decorating brushes and rollers	146.4	161.0	161.0	161.0	162.1
Toilet brushes	157.2	168.0	168.1	177.0	177.9
494 **Toys, games, children's carriages and sports equipment**	150.2	164.4	166.5	169.8	172.9
494/1 **Toys and games**	146.2	162.7	163.4	168.0	171.5
Dolls and soft toys	156.2	167.1	167.6	168.1	170.4
Mechanically self-propelled and die-cast metal toys	146.0	167.8	169.2	173.8	178.0
—mechanical (self-propelled) including train sets	140.9	157.0	157.6	165.1	165.9
—die-cast toys	146.9	169.6	171.3	175.7	180.9
Indoor table games	143.0	157.4	157.4	157.4	160.9
494/3 **Sports equipment**	164.3	171.6	177.9	177.9	180.5 e
495 **Miscellaneous stationers' goods**	141.4	147.6	147.7	151.0	152.9
495/1 **Pens and pencils**	149.9	159.1	159.5	162.8	166.3
Ballpoint pens	154.0	158.2	158.2	163.0	165.9
Fountain pens, stylos and markers	147.1	156.0	156.0	160.3	166.7
Fountain pens with stainless steel nibs	150.9	163.1	163.1	170.8	170.9
496 **Plastics products**					
Building materials of plastics	154.1	182.0	183.5	191.7	195.3
Pipes and fittings of plastics	158.9	192.1	193.2	204.9	210.8
Rainwater pipes and fittings of plastics	158.0	186.4	187.2	196.5	205.4
Packaging products and transit containers of plastics	145.1	166.9	170.5	174.0	178.0
Other plastics products					
Haberdashery of plastics (including slide and zip fasteners)	149.5	156.8	159.5	160.8	160.7
499/1 **Musical instruments**					
Pianos	155.5	163.5	163.5	163.5	170.3
Other indices					
312, 361/2, 362, 369/5 Part Electrical installation materials, domestic	145.2	163.1	169.2	174.1	178.8
338, 399/1, 399/3, 472 Part Office equipment and machinery (excluding computers and calculators)	147.8	156.6	156.3 p	161.4	164.5
399/1, 472 Part Office furniture	146.8	162.4	163.0 p	170.6	172.9
Special indices					
Granite and limestone roadstone	165.7	176.7	190.8	194.3	201.8
Gas oil fuel					
Petroleum products	152.3	168.0	174.0	186.5	207.5
Steel sheets	162.3	164.6	165.1	165.2	173.2
Steel sheet piling	163.0	180.1	180.1	180.1	180.2
Finished stainless steels	142.1	143.9	144.8	145.2	151.7
Finished steels (other than sheets tin-plate, tubes, forgings and castings)	150.5	157.9	159.0	159.2	163.7
Steel castings	158.9	179.4	179.7	180.1	180.9
Semi-finished steels for forgings (other than drop forgings)	168.9	189.0	190.2	191.7	198.6
Malleable iron castings	156.9	180.5	181.0	180.7	180.9
Wrought aluminium	175.5	186.6	187.9	191.7	192.4
Brass ingots	124.7	157.2	152.8	146.5	148.0
Door sets, leaves and frames	156.7	170.7	171.2	171.5	178.9
Domestic furniture	146.0	161.0	161.2	161.4	165.6
Divan sets	150.0	168.3	168.3	168.3	172.9

[1] Index based on scheduled outer zone prices for minimum bulk loads of 500 gallons (motor spirit 1000 gallons) exclusive of rebate.
[2] Source of price information: trade publications.
[3] Inclusive of VAT and car tax.
[4] These indices are specially constructed outside the normal wholesale price index structure. Their continued publication is a temporary measure to enable extant VOP contracts to be completed.

p Provisional. e Estimates which are subject to possible major revision. r revised

More about wholesale price indices

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General inquiries and tables 1, 1a and 2 Tables 4 and 5

01-215 3073
01-215 3544
01-215 3173

Table 3: SIC Orders II-VI and XII **01-215 5216**
SIC Orders VII-IX and XVI **01-215 3549**
SIC Orders XI, XIII-XV and XVII-XIX **01-215 3548**

Revision to table 3

1968 SIC		1978 Sep	Oct	Nov	Dec	1979 Jan	Feb	Mar
279	Explosives, fireworks, etc	158.8	163.4	163.4	164.1	165.6	165.6	165.6

Table 4 Commodities wholly or mainly imported into the United Kingdom

1975 = 100

	1978 Jul	1979 Apr	May	Jun p	Jul p
Hides, skins and fur skins undressed					
Hides and skins, imported	261.0	469.8	454.4	377.7	342.3
Hides	252.6	465.2	453.9	380.1	343.9
Wet	255.4	471.4	461.6	384.0	346.4
Dry	210.8	373.6	339.9	322.5	306.0
Calf skins	370.7	530.1	460.2	345.3	321.9
Hides and skins, UK origin	252.7	447.0	454.5	422.1	411.0
Hides and skins, UK origin and imported	250.8	451.0	451.0	402.4	381.4
Oilseeds, oilnuts and oil kernels	144.8	154.3	155.8	158.5	149.3
Groundnuts, African, cif Europe [1]	167.4	149.5	143.8	129.2	128.6
Copra, Philippine, cif Europe [1]	207.8	299.2	306.8	294.7	283.5
Palm nuts and kernels, Nigerian, cif Europe [1]	204.0	265.9	281.5	272.3	251.1
Soya beans, US No. 2 grade, cif UK [1]	140.3	145.4	146.9	152.3	142.5
Linseed, Canadian No. 1, cif UK [1]	93.6	100.7	97.8	105.4	102.3
Animal oils and fats					
Herring oil [1]	154.7	142.4	144.7	141.6	132.4
Fixed vegetable oils and fats					
Cottonseed oil, washed [1]	111.4	133.2	132.3	128.7	131.9
Groundnut oil, London, spot price [1]	159.1	238.7	238.7	238.7	238.7
Olive oil, Spanish edible, max. 1% ffa [1]	114.9	119.9	119.9	116.4	115.3
Linseed oil, cif London/Hull [1]	74.3	99.2	93.6	96.0	93.1
Palm oil, crude, London, spot price [1]	192.8	173.2	168.2	167.8	161.9
Coconut oil, cif Europe [1]	194.9	287.3	297.2	286.0	282.4
Castor oil, Brazilian No. 1 grade [1]	164.6	148.1	146.9	155.8	168.3
Crude rubber					
Natural rubber smoked sheet [1]	172.5	196.2	199.6	207.8	191.5
Wood, lumber and cork					
Softwood (delivered to consumers)	148.1	165.7	167.4	168.3	169.6 e
Hardwood (ex yard or wharf)	169.2	191.7	191.9	192.8	198.8
Keruing	133.0	169.6	173.2	175.8	176.5
Ramin	164.0	222.2	218.8	218.6	220.6
Utile	201.5	215.0	217.4	217.4	217.4
Meranti	141.0	164.5	165.7	167.0	176.0
Wood and cork manufactures					
Plywood and blockboard (delivered to consumers)	151.2	171.3	172.2	173.3	177.4 e
Pulp and paper					
Woodpulp	92.3	104.6	105.4	102.7	95.7

	1978 Jul	1979 Apr	May	Jun p	Jul p
Paper, paperboard and manufactures thereof					
Paper and paperboard	127.1	136.5	137.5	141.0	141.0
Newsprint paper	147.4	159.9	159.9	166.4	166.4
Textile fibres					
Raw wool, greasy or fleece washed, imported	155.6	159.0	158.4	157.6	155.4
Merino	139.2	140.4	140.1	139.0	136.5
Crossbred	176.0	182.2	181.2	180.8	178.8
Raw wool, UK origin	200.4	207.4	202.1	197.2	193.2
Raw wool, UK origin and imported	164.5	168.7	167.1	165.5	162.9
Raw cotton [1]	159.5	150.6	155.2	153.2	143.7
Raw jute [1]	117.4	115.3	117.1	123.2	127.7
Crude fertilisers and crude minerals					
Natural phosphates	74.2	79.3	79.0	77.8	77.4
Asbestos, Canadian, fob Quebec [1]	141.7	141.5	141.6	136.2	136.2
Steatite talc [1]	143.8	166.7	166.7	166.7	166.7
Metalliferous ores and metal scrap					
Bauxite, min. 86% Al_2O_3 [1]	160.1	170.5	170.5	170.5	170.5
Manganese ore, 48-50% Mn grade max. 0.1% P, cif Europe [1]	113.4	103.7	104.4	102.2	95.5
Chrome ore [1]	117.2	107.1	107.9	105.5	98.7
Tungsten ore, min. 65%, cif Europe [1]	156.7	170.8	165.2	166.7	151.9
Titanium ore [1]	112.7	98.8	99.6	97.7	92.8
Non-ferrous metals					
Silver, refined and partly refined [1]	140.8	179.2	203.3	203.4	202.6
Copper, LME settlement price [1]	126.4	181.0	167.7	159.8	143.9
Nickel, free market price [1]	117.2	144.6	178.2	173.4	148.1
Lead, LME settlement price [1]	165.1	299.8	323.2	351.4	304.3
Zinc, producers' price [1]	83.0	105.5	107.4	109.4	102.4
Zinc, LME settlement price [1]	91.8	112.9	112.8	106.6	95.3
Tin ingot, min. 99.75%,LME settlement price [1]	212.1	236.4	241.4	246.4	227.2
Magnesium [1]	145.7	145.7	145.7	145.7	145.7
Bismuth [1]	75.6	68.8	69.6	68.1	60.4
Petroleum and petroleum products					
Crude oil [2]	141.4	141.0	151.0	155.0	155.0 e
Chemical elements and compounds					
Mercury, min. 99.99%, cif Europe [1]	115.4	217.2	252.3	282.8	229.0

[1] Source of information: trade publications. [2] Based on unit value of imports at their time of entry. p Provisional. e Estimates which are subject to possible major revision.

Table 5 United Nations index numbers of world export prices [1] (see note below)

1975 = 100

	Primary commodities: Total $	£	Purchasers' currencies	Agricultural non-food $	£	Purchasers' currencies	Non-ferrous metals $	£	Purchasers' currencies	Primary commodities and non-ferrous metals [2] $	£	Purchasers' currencies
1975 1st qtr	102	94	101	103	96	102	104	97	103	102	94	101
2nd	98	93	96	100	95	98	102	97	100	99	94	97
3rd	98	102	99	100	104	101	99	103	100	98	102	99
4th	102	111	104	97	105	99	95	103	97	101	110	103
1976 1st qtr	103	115	108	101	112	105	100	111	104	103	115	108
2nd	105	129	108	107	132	110	111	137	114	106	130	109
3rd	106	133	108	110	138	112	117	147	119	107	135	109
4th	108	145	108	121	163	121	108	145	108	108	145	108
1977 1st qtr	117	152	117	126	163	126	120	156	120	117	152	117
2nd	120	155	119	133	172	132	117	151	116	120	155	119
3rd	116	149	114	118	151	116	114	146	113	116	149	114
4th	116	142	112	117	143	113	117	143	113	116	142	112
1978 1st qtr	118	136	112	122	141	115	119	137	113	118	136	112
2nd	118	143	109	129	156	119	120	145	110	118	143	109
3rd	119	137	105	134	154	118	129	148	113	120	138	105
4th	122	137	105	141	158	121	138	155	119	124	139	107
1979 1st qtr	127	140	111	150	165	131	155	171	135	131	144	114
2nd (3)	*137*	*146*	*123*	*158*	*168*	*142*	*169*	*180*	*151*	*141*	*151*	*127*
July (4)	*139*	*137*	*125*	*165*	*162*	*148*	*166*	*163*	*149*	*143*	*141*	*128*

[1] Published by the UN in terms of US Dollars. For convenience the index numbers are also shown in sterling and in terms of puchasers' currencies by converting the dollar index at prevailing exchange rates. [2] This combined index is not published as such by the UN. [3] Provisional. [4] Projections by Department of Industry.
Note.: Due to an error in the base year data, the sterling and purchasers' currencies series have been revised throughout.

Higher prices for wire rods and other home produced steel products made significant contributions to the 1½ per cent increase in the index for the metal goods industries. The higher prices for home produced steel products also made a significant contribution to the 1¼ per cent increase in the index for the mechanical engineering industries. In both of these sectors the increases were slightly mitigated by lower prices for imported light metals.

Lower prices for imported non-ferrous metals, in particular copper and lead accounted for over three-quarters of the 4¾ per cent fall in the index for the non-ferrous metals industry. This index has now fallen by 5¾ per cent over the latest three months.

The index for materials purchased by the food manufacturing industries rose ¼ per cent between June and July to 171.2. There were higher prices for sugar and lower prices for home-produced cereals.

British Film Fund Agency returns

The British Film Fund Agency has authorised the publication of the following information for the five weeks ended 30 June 1979.

	£
Distributors' earnings submitted	
Low-cost films:	
Eligible (after multiplying by 2½)	65,135
Not Eligible for 2½ times rental	108,861
	173,996
High-cost films (including newsreels after multiplying by 2½)	723,295
	897,291
Films under 3 000 ft (after multiplying by 2½)	111,577
	£1,008,868
Levy collections paid to Agency by Customs and Excise to 24 July 1979 approximately covering entertainments for the five weeks ended 30 June 1979	£498,033

The eighth interim allocation for the twenty-second year will be at the rate of 36 per cent.

Cinema admissions and takings in May

During May, counted as a four-week period, the weekly average of admissions to cinemas in Great Britain was 2.24 million and the weekly average of gross box office takings was £2.36 million. The comparable figures for May 1978 were 2.15 and £2.08 million.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday 10 August 1979.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
Freshwater Dive	BR/E 40142/11/8/84	16	8 August	United Artists Corporation Ltd	New Zealand National Film Unit
Quadrophenia	BR/E 40144/11/8/84	118	8 August	Brent Walker Film Distributors Ltd	The Who Films Ltd
King Kenny	BR/E 40145/11/8/84	27	8 August	Brent Walker Film Distributors Ltd	Outrider Films Ltd
Bahrain – Pictures of an Island	BR/E 40147/11/8/84	21	8 August	GTO Films (Distributions) Ltd	Tripod Films Ltd
The Last Barsham Faire	BR/E 40148/11/8/84	22	8 August	GTO Films (Distributions) Ltd	Minstrel Films Ltd
Licensed To Love and Kill	BR/E 40149/11/8/84	94	9 August	Lindsay Shonteff Film Productions Ltd T/A Firebird Films	Lindsay Shonteff Film Productions Ltd
FOREIGN					
Manhattan	F 40143	96	8 August	United Artists Corporation Ltd	Jack Rollins and Charles H. Joffe Productions, Heywood Productions Inc and Hillary Productions Inc, New York
Last Feelings	F 40146	98	8 August	GTO Films (Distributions) Ltd	Tritone Cinematografica SRL, Rome
The Tennis Match	F 40150	14	10 August	Columbia-EMI-Warner Distributors Ltd	Perk Productions 1977 Ltd, California
The Main Event	F 40151	109	10 August	Columbia-EMI-Warner Distributors Ltd	Warner Bros Inc, California

AMENDMENT TO THE REGISTER

The registration number of the film 'Mondo Eriotico' registered on 28 June 1979 has been amended to EC 40100/30/6/84.

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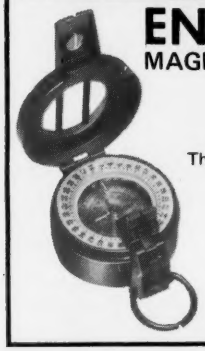

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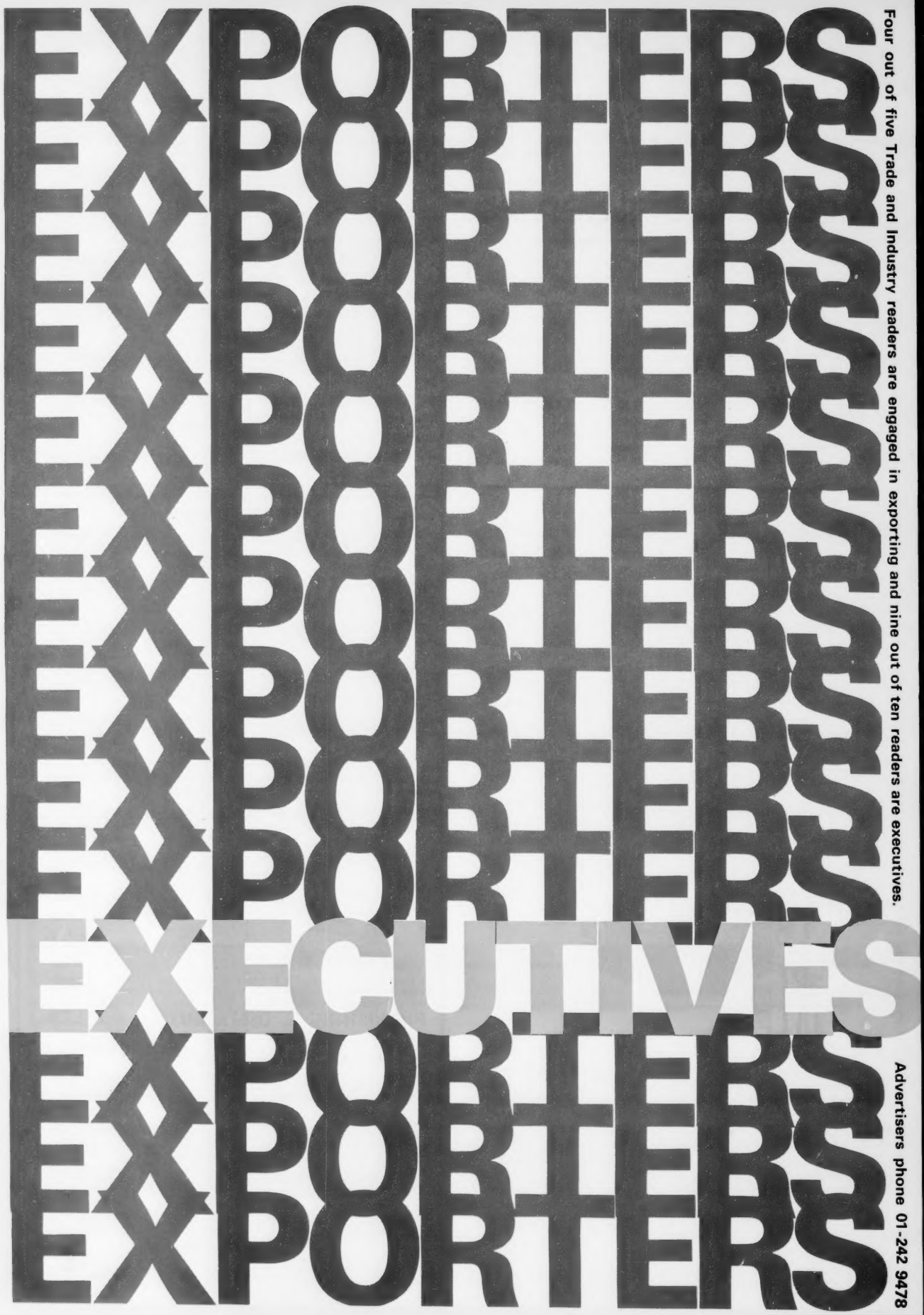

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